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1 INTRODUCTION

1.1 FLEET MANAGEMENT INFORMATION SYSTEM

This RFP seeks proposals from Prospective Proponents for the acquisition of a Fleet Management Information System (FMIS) solution to enable the City of Vancouver to effectively manage Fleet assets and Equipment Services group (EQS) activities.

The solution is expected to be a comprehensive one that is based on field-tested software and technical components.

The solution will include software, installation, configuration, maintenance, support and services, and will enable the City to perform the following:

- Asset Management of fleet vehicles and equipment through the full life cycle
- Improved real-time monitoring and allocation of equipment resources to City Branches
- Optimized preventative maintenance based on usage or service intervals
- Real-time support for garage operations and technician time tracking
- Comprehensive access to records of equipment history, repairs and maintenance for staff and customers
- Customer communications regarding job status and scheduling of service appointments
- Effective usage of workspaces and workforce skills
- Development of analytics to indicate trends and historical performance

The new solution will ensure:

- Technical architecture is based on a common and open platform that can integrate with a variety of City technology platforms such as: Telematics, Fuel Management, Document Management, and Finance
- Scalability and adaptability to future business needs and technology changes
- Adherence to City, Provincial and Federal policies and regulations regarding Privacy and Data
- “Best Value” to the City; the City desires a solution that will either meet or exceed its Fleet Management Information System requirements prescribed herein.

The City expects to roll out the Fleet Management solution to over 180 City employees. While there are two distinct work areas which will input information & data into the solution: Equipment Services and Supply Chain Management (Stores), the information contained within the solution will be referenced and accessed across multiple departments and will have multiple integration points into existing City applications in those departments.

The following summarized organizational chart (Figure 1 - Summarized City Organizational Chart of Fleet Management Stakeholders) outlines the various groups considered stakeholders for the Fleet Management solution and includes both the users and platform support providers. Each work area has its own requirements and expectations from the Fleet Management solution.

Refer to Figure 3 - Fleet Management System Overview in section 2.2.2 for a summarized illustration of the solution functions.

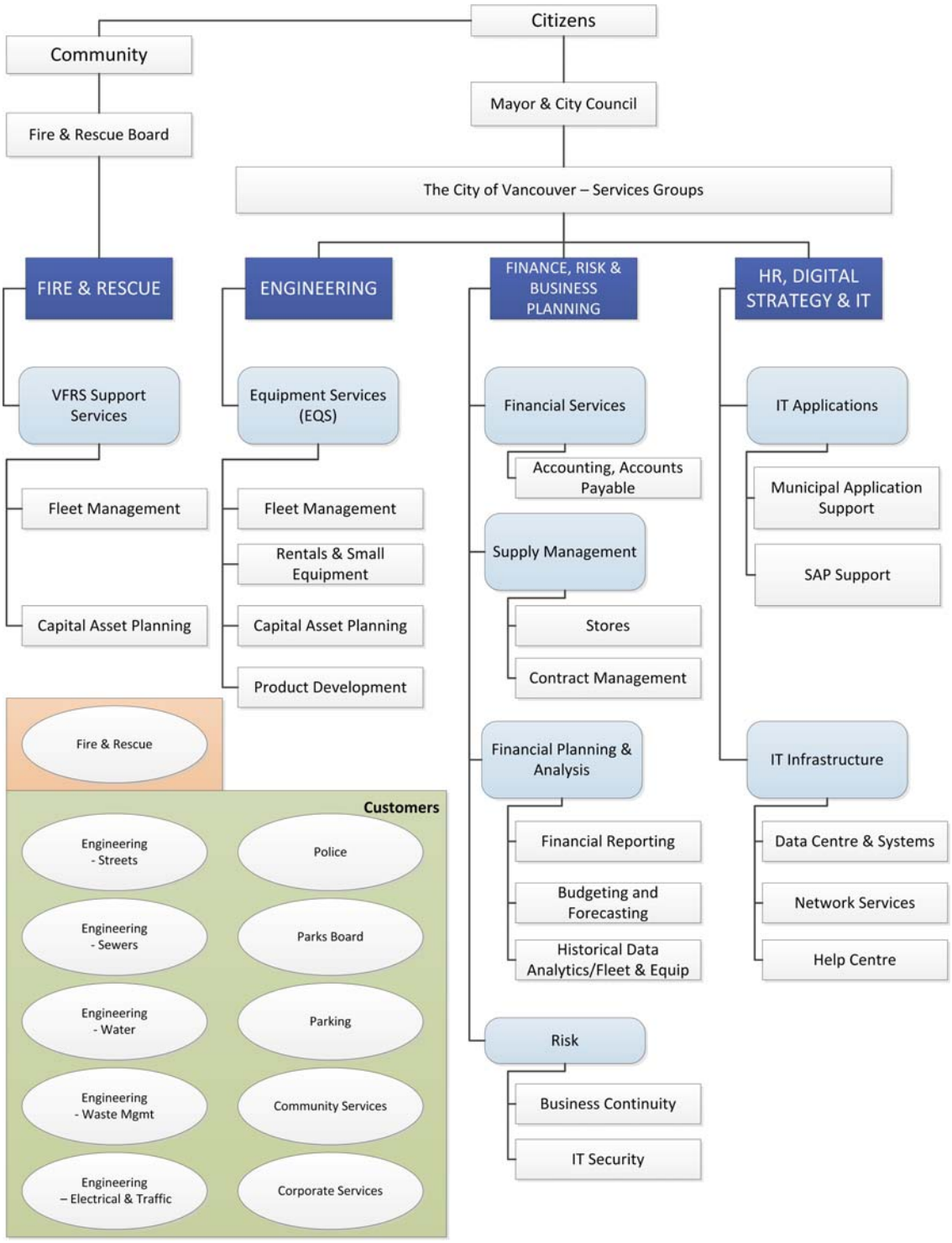

Figure 1 - Summarized City Organizational Chart of Fleet Management Stakeholders

1.2 THE EQUIPMENT SERVICES DIVISION AND FIRE & RESCUE SUPPORT SERVICES GROUP

The Equipment Services Division (EQS) is one functional group within the City of Vancouver's Engineering Branch. The primary purpose of the Equipment Services Division is to provide centralized management and service of fleet vehicles and equipment for all City branches, including: Police, Streets, Sewers, Water, Parks, Sanitation, Landfill, and all departmental light vehicles. EQS ensures the City's equipment receives required modifications, servicing and inspections to achieve maximum utility and cost effectiveness.

The Support Services group for the City's Fire & Rescue Services (VFRS) operates in cooperation with EQS, using the same FMIS solution as EQS. Common maintenance tasks, e.g. oil changes, are sent to the EQS facility at National Yard; specialized VFRS fleet maintenance is done at the VFRS maintenance facility.

For this RFP the requirements from VFRS have been included with those of EQS.

1.2.1 MAINTENANCE LOCATIONS

The City currently has five garages for maintenance activities, four of which have on-site Parts Stores. The largest site, Manitoba Yard, also has a tire shop and body shop.

There are twelve (12) Field Service trucks for in-field repairs and tire service; ten dispatched by EQS and two by VFRS.

- Manitoba Yard (EQS) 250 W. 70th Ave., Vancouver, V5X 2X1
  - Provides mechanical service for heavy truck, heavy equipment, light truck and automotive repairs, preventative maintenance programs, commercial vehicle inspections (CVI) programs. Also includes shops for vehicle outfitting, body repairs, small equipment and mower repairs, tire repairs, carpentry, machining and fabrication. The Rentals & Small Equipment pool is housed at Manitoba Yard.
- National Yard (EQS) 701 National Ave., Vancouver, V6A 4L3
  - Provides mechanical service for heavy truck, heavy equipment, extensive light truck and automotive repairs. Most Fire (VFRS) and Police (VPD) vehicles receive PM services at this location. The garage is licensed to do Commercial Vehicle Inspections (CVIs).

- Burns Bog (EQS) 5400 72nd Ave., Delta, V4K 3N2
  - Geared specifically towards Landfill operational equipment which includes bulldozers, compactors, tracked hoes, stationary plants, highway transfer tractors and trailers
- Evans Yard (EQS) 955 Evans Ave., Vancouver, V6A 4C8
  - A small shop servicing Parks Board equipment; light vehicle repairs and services, lawn mowing equipment, power washers (no Stores at this location)
- Fire Headquarters (VFRS) 900 Heatley Ave., Vancouver, V6A 3S7
  - Outfits and maintains Fire & Rescue Services (VFRS) vehicles and equipment including heavy trucks, aerial trucks, light trucks, fire boats, pumps, air compressors, mobile platforms for rescue equipment, and small equipment. The garage is licensed for Commercial Vehicle Inspections.

1.2.2 OPERATING HOURS AND FACILITY SIZE

Facility	Bays	Shops	Employees	Operating Hours	Shifts	Days / Week
Manitoba Yard (MY)	16	12	130	6:30 am – 1:00 am	2	5
National Yard (NY)	8	3	20	6:30 am – 1:00 am	2	5
Burns Bog - Landfill	2	2	7	6:30 am – 1:00 am	2	5
Evans Yard – Parks Board	1	1	1	7:30 am – 3:30 pm	1	5
VFRS – Fire Headquarters*	2	1	10	6:30 am – 4:30 pm	1	7

Table 1 - Fleet Maintenance Facilities

*Staff work a rotation of 4 days on, 2 days off; on-call 24 hrs

1.2.3 FLEET PROGRAMS

Equipment Services provides vehicles and equipment to City Branches using an internal leasing model. All equipment units are owned by EQS, and allocated and billed to customer groups. EQS plans fleet acquisitions, provides specifications for procurement, organizes short-term leases and external rentals to augment City assets, and manages an in-house pool of small equipment and loaner units. Custom equipment or part design is an additional function performed by the Product Development team.

Equipment Services is responsible for:

Fleet Maintenance

- Outfitting of new equipment to meet City requirements
- Preventative Maintenance of equipment
- Repairs – in the Shops, from mobile service trucks, or sent to external providers
- Rebuild or fabrication of parts
- Warranty management

Fleet Administration and Safety Compliance

- Registration and Insurance
- Commercial Vehicle Inspections
- Accident Reports and Claims Administration
- Workforce certifications

Fleet Asset Management

- Acquisition and disposal of fleet vehicles and equipment
- Allocation of equipment to City Branches
- Setting charge-back rates for equipment
- Performance Analysis
- Capital Asset Planning

Motor Pool, Leases, Rentals and Small Equipment

- Augment City fleet and shared equipment pool with leases or short term rentals of items from commercial sources:

- Vehicles and heavy equipment
- Small equipment

- Manage booking and billing of the Motor Pool of Service Loaner equipment (heavy trucks and equipment only; light vehicles are booked through a commercial car-share service)
- Internal rentals to customers of items from City shared equipment pool
- Small equipment and Tools management

1.3 FMIS CUSTOMERS

All of the FMIS customers are internal to the City, representing eight Engineering Divisions, the Parks Board, Police, Fire and multiple partner groups.

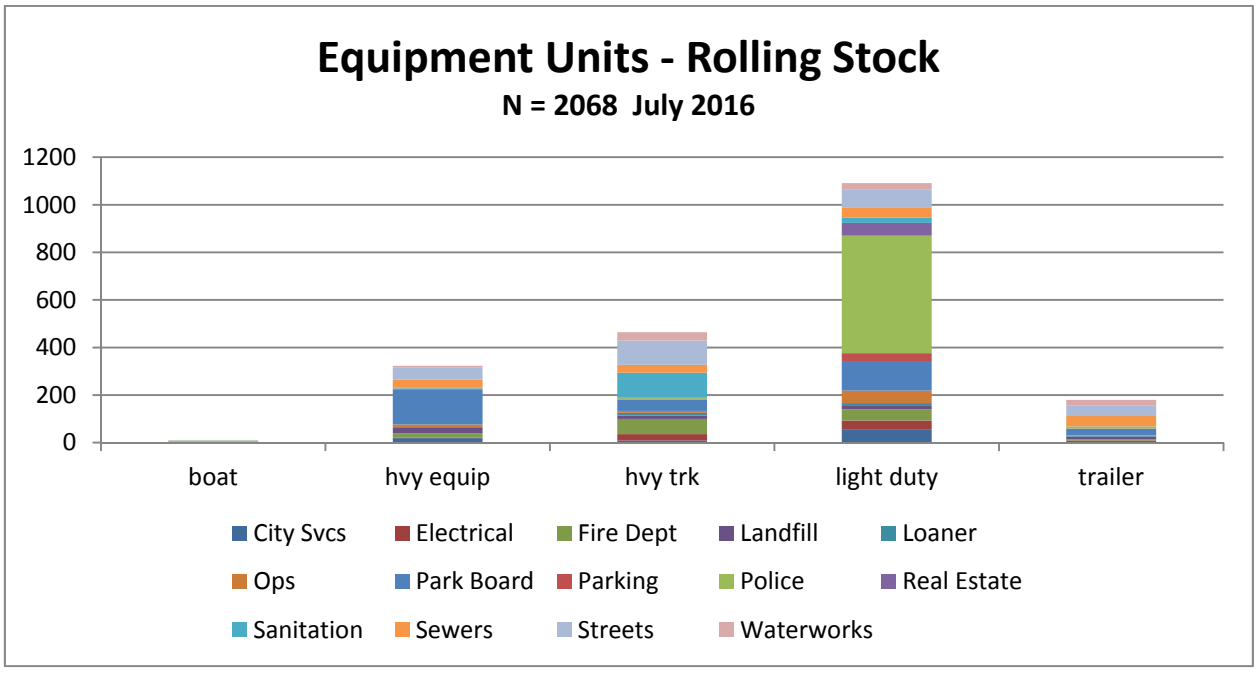

Figure 2 - FMIS Customers and Equipment Units

1.4 ANTICIPATED USER ROLES

Each of the Employee and Customer Roles identified in Table 2 have unique requirements of the FMIS solution: e.g. search, usage analysis, asset planning, opening a work order, scheduling a service appointment, ensuring parts availability, assigning job tasks, reviewing task hours, managing inventory, dispatching field resources and generating analytics or cost reports. Table 2 provides a summary table of the FMIS roles within Equipment Services – whom will be the primary users from a data input standpoint – and the basic customer roles.

Table 2 - FMIS User Roles

FMIS User Roles	General Responsibility
Control Centre - Control Centre Clerk - Dispatcher - Service Writer	Intake & Release Customer interactions
Fleet Operations Support - Maintenance Coordinator - Warranty Foreman - Accident Repair & Claims Foreman	Service Scheduling - PMs - Unplanned services - Inspections Resource Leveling Claims Tracking
Garages / Shops / Field Services - Mechanics - Technicians - Working Foreman Trades (WFT) - Garage/Shop Superintendents	Maintenance, Repair and Fabrication Work
Stores - Store Keeper - Stores Clerk - Stores Buyers, Planners - Stores Supervisor	Materials Management Parts Stores, Purchasing, Receiving, Invoice Processing
Rentals & Small Equipment - Rentals Clerk - Rentals Supervisor	Dispense equipment for short-term use Contract with commercial vendors Inspect equipment and send for repairs
Fleet Planning - Fleet Planner - Equipment Analyst - Finance Planning	Acquisitions and disposals Performance analysis
Administration - Finance Clerk - Finance Supervisor - EQS and VFRS Management	Billing Setting charge-back rates Business Unit KPIs

CUSTOMER ROLES	
Operations - Equipment Operator - <Branch> Foreman - Fleet Supervisor	Reporting equipment problems Requesting short-term extra equipment Coordinating service appointments and equipment delivery & pickups
Administration - <Branch> Project Managers - <Branch> Finance - <Branch> Management	Long-term planning for Project needs Coordinate with Fleet Planning Monitor costs and performance

1.5 ASSETS AND WORK ORDER VOLUMES

The FMIS is used for all asset management activities for the equipment described in this section, including preventative maintenance and tracking safety inspections.

1.5.1 FLEET SIZE

Equipment Services manages a fleet of 2,100 vehicles for the City. See Figure 2 - FMIS Customers and Equipment Units for the type distribution.

The fleet size has been near-constant in the last few years; in 2015 there were 528 units brought into service and 525 units decommissioned. In 2016 the Fire & Rescue fleet will be receiving 26 new vehicles and expanding the marine fleet with two additional fire boats.

1.5.2 ATTACHMENTS, STATIONARY AND SHOP EQUIPMENT

There are approximately 1,000 pieces of equipment under management in this category. Attachments, Stationary items, e.g. the air compressors at the Fire Halls, welding machines and other Shop equipment comprise the bulk of the items.

Critical items, such as shoring boxes and overhead doors, receive PMs and regular inspections as part of the City's safety program. Tracking of the maintenance and safety inspections is done in the FMIS.

1.5.3 SMALL EQUIPMENT AND TOOLS

EQS manages a pool of Small Equipment and Tools of approximately 2,400 pieces. This category includes drills, jackhammers, generators, pumps, chainsaws, mowers and parks maintenance equipment. All PMs, safety inspections and repairs to the small equipment are managed within the FMIS.

1.5.3.1 RENTALS

A portion of the Small Equipment pool is made available to internal customers on a short-term rental basis, with the rental bookings, agreements and billings in a separate system from the FMIS. As needed, the rental pool is augmented with additional pieces from commercial sources.

Customers provide billing information at the start of a rental contract; EQS generates bills monthly based on rental rates and surcharges for overdue or damaged equipment.

1.5.4 WORK ORDER AND PARTS VOLUMES

Table 3 - 2015 Statistics

2015 Statistics	Annual Volume	
Work Orders	31,000	PMs: 5,700 Repairs: 25,300
Work Orders opened daily	Average: 85	Maximum: 195
Repair lines	77,000	
Warranty Claims	700	Includes Recalls:400
Parts Requisitions	103,000	
Parts – Active SKUs	210,000	In-Stock SKUs: 9,000
Parts - Invoices	41,000	Processed by EDI: 22,000
Sublets	3,100	
Active Mechanics / Technicians	160	
Fleet Supervisors (Customers)	12	

1.6 CURRENT STATE OF FMIS TECHNOLOGY WITHIN THE CITY OF VANCOUVER

The City is currently operating a commercial FMIS solution "FasterWin" (formerly FASTER-CCG), first installed in 1998, and heavily customized over the years to add necessary functionality. The existing solution is locally-hosted by the City, and runs on a SQL Database. Recently, changes have been primarily limited to protecting the stability of the platform.

Parts inventory is managed within the current FMIS. Invoices are matched to Purchase Orders and Goods Receipts recorded in the FMIS, approved and passed to SAP for payment. In the garages the City has "Matrix" fluid dispensing systems, not yet integrated to the FMIS.

Warranty entitlements are registered in the FMIS, but recovery claims are prepared and tracked in a manual system.

Fuel management is done using "Fleet Head Office" software from GasBoy; fuel costs are accumulated and billed monthly to customer groups from a custom system.

Telematics and on-vehicle GPS devices are being rolled out gradually across the fleet. Approximately 200 vehicles are in Phase 1 of the rollout, and will be using the devices by Q3 2016. New acquisitions will be outfitted with telematics; older equipment will be considered for the devices on a case-by-case basis. A cloud service (Geotab) is used to collect and provide data, including fuel consumption and vehicle diagnostics.

Rentals of Small Equipment and Tools are managed in a different commercial solution "TrakQuip", designed for oil & gas industry service companies.

Capital Asset analysis and investment planning occurs in a custom City system known as "the Vault". Procurement and disposal activities are managed in the document management system, as is most of the Accident Repair tracking.

SAP is the City's ERP, used for Accounts Payable processing and cross-department internal billing. Work Order costs are posted to SAP by processing a FMIS billing file through middleware (BizTalk). Monthly costs for fuel, short term rentals, and long term equipment allocations are prepared in a custom system, and then posted to SAP for billing to internal customers.

Detailed reports of Work Order costs are available on request to the EQS clerks. The primary reporting engine is Microsoft SQL Server Reporting Services (SSRS).

The City does not presently use mobile devices, optical code identification labels, or RFID technology for fleet management activities.

The City is aware of technology advancements currently available in the marketplace that would enhance existing operations and as such, wish to procure the most suitable vendor to enable its near and long term benefits realization.

2 PROJECT DETAILS

2.1 PROJECT ROLLOUT APPROACH AND SCOPE OF WORK - OVERVIEW

Where feasible, the City envisions the implementation of the proposed solution in phases using elements of agile methodology. It would be desirable to roll-out a core system first. That is, rolling out those solution functions that are equivalent to the current system core functionality, then adding additional functionality in future phases. The intent is to speed up the release of the core system and reduce the inherently higher level of risk associated with rolling everything out at once.

2.1.1 PROJECT SCOPE OF WORK

a. **Solution Implementation**. Furnish, install, and implement a Fleet Management Information System that meets or exceeds the Functional and Technical Requirements;

b. **Processes and Procedures to ensure Business Continuity.** The proponent must provide details outlining their processes and procedures to ensure City business continuity and system availability;

c. **Database.** Ensure a database system can store the collected information and meta-reports as required, and security/redundancy of the data at the primary storage site;

c. **Reports.** Provide required reports and statistics and functionality to perform ad-hoc queries and reports as needed by the business;

d. **End-user Application Training and Documentation.** Provide hard copy and web-based (and/or recorded) training and documentation;

e. **Software Licenses.** The Proponent shall provide all licenses for the proposed solution provided to the City – note: details of the user license to be provided by the Proponent must be clearly stated in the Proposal;

f. **Warranty and Service.** Once the solution is accepted by the City, the Proponent will provide all required services to ensure adequate technical support and maintenance both during roll-out; continuing thereafter for future prescribed periods, details of which will be defined within support and maintenance agreements with the City prior to contract award. The Proponent will work with the City's representatives to develop and agree upon a Service Level Agreement (SLA) which details all service expectations;

g. **End-to-End Performance Test**. Conduct an end-to-end, full solution Performance Test and Quality Assurance Tests in accordance with the requirements set out in this RFP;

h. **System Acceptance Certification.** Certify the installed solution has met all conditions outlined in the Solution Acceptance section of this document and the requirements in Annex 2 and Annex 3; and

i. **Enable Future Enhancements.** Remain technologically relevant, scalable, and extensible to accommodate future solution enhancements that will be required to satisfy operational requirements, inclusive of the provision of a technology platform/application solution that meets requirements specified in Functional and Technical requirements set out herein.

The outcome of this scope of work will provide the City with a modern, integrated, highly available, cost-effective Fleet Management Information System that will enhance effective operations and contribute to current business process improvement initiatives.

2.2 EXPECTATIONS OF FMIS TO EMPOWER CITY BUSINESS

As a component of the proposal evaluation, proponents are expected to complete the Capability Matrix tabs found in Annex 2 – Schedule of Functional Requirements spreadsheet, in which anticipated business capabilities are outlined. Proponents are expected to link functions within their proposed solution to the specified capabilities, to ensure that City evaluation staff understand how features will be related to their anticipated business benefits.

Capabilities have been categorized by general business function which can be seen in Figure 3, which illustrates the minimum and desired system functions in the Fleet Management Information System.

2.2.1 FMIS CUSTOMER AND USER REQUESTS

The City conducted interviews with its customers and EQS employees to identify capabilities lacking in the current system, targets for potential streamlining, communications issues, and options for using new technology or updating processes.

From those interviews two sets of themes emerged: customers are demanding better real-time status information, improved communication with EQS, and visibility into FMIS data; EQS employees wish to leverage the FMIS to streamline repetitive processes, connect FMIS data stores and documents, and benefit from modern interface devices.

These requests are supplemental to basic system operations, representing new-and-improved capabilities to the user community.

Customer requests:

- Customer portal with group-specific status reports
- Appointment scheduling – visibility and alterations
- Notifications – upcoming appointments, completed jobs
- Detailed billing reports
- Access to Asset history
- Self-serve access to report library
- Equipment manuals
- Future: mobile device applications for submitting problem reports, requesting tow trucks, urgent repair alerts, notifications

Equipment Services requests:

- Standard job templates
- Mobile device access for technicians
- Easy collection of/connection to photos and documents
- Bar codes on parts
- Manufacturer recall, campaign and one-time PM management
- Planning and Scheduling tools – forecasting and daily operations
- Skillset management
- Performance analytics

2.2.2 ANTICIPATED CAPABILITIES OF THE SOLUTION

The Solution's capabilities should include:

a. Asset management covering the full lifecycle from acquisition to disposal

b. Planned Maintenance forecasting, based on date or meter reading

c. Parts history, including in-service dates, parent assembly and maintenance activities

d. Warranty eligibility and claims tracking; Manufacturer Recall service tracking

e. Materials Management – Parts Master, real-time inventory, parts reservations, core tracking, parts kitting, purchasing and receiving

f. Maintenance Work management – estimates, Work Orders, task assignments, time entry, parts requisitions, external repairs (sublets)

g. Standard Jobs for Work Orders – predefined activities, parts and repair lines, task lists with repair codes

h. Scheduling for services, based on availability of parts, people with specific skill sets or certifications, workspaces and tools

i. Reporting and Analytics that will enable the business to analyze current costs and performance, historic and emerging trends

j. Integration with the City Financial systems

k. Robust methodologies for 3rd party and associated City application data integration

In order to capture all Fleet Management activities, desired capabilities include:

l. Notifications to staff and customers for service appointments, job status, job completion

m. Service Loaner and short term Rental provision and tracking; small equipment rentals from City equipment pool

n. Customer portal for visibility into Work Order details and job status, historical reports for specific equipment, and self-serve appointment scheduling

o. Use of data collected by other systems, e.g. fuel stations, fluid dispensers, telematics

p. Capital Asset Investment Planning

q. Accident Repair & Claim Tracking; this function will track repair costs and recoveries to support the City's Accident and Offence Tracking System (AOTS)

r. Advanced analytics tools for performance management, fleet allocations, reliability-centered maintenance and inventory optimization

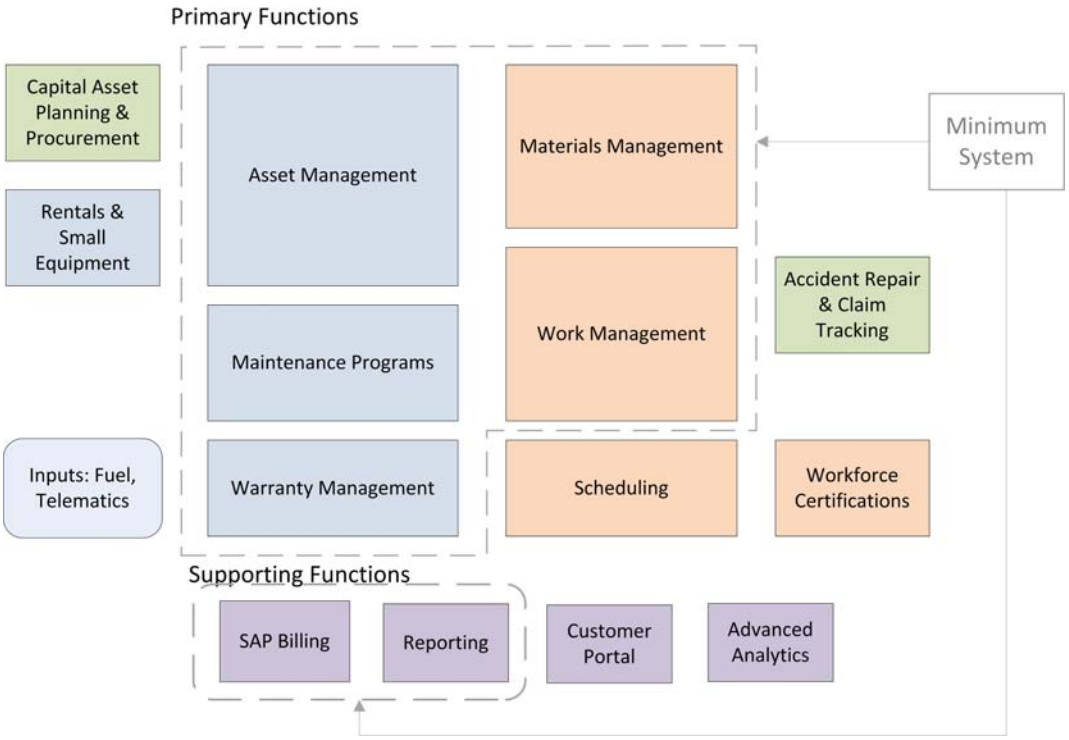

Figure 3 - Fleet Management System Overview

2.3 CITY APPLICATION ARCHITECTURE EXPECTATION

The City places a strong emphasis on delivering value to its citizens. Generating value means using resources efficiently. Purchased products and services need to fit well within the City environment, and be sufficiently open such that the City can adjust the use of its assets based on the changing needs of the organization.

It is critical that the Proponent provide the City with a solution that has application architecture which:

- can be easily augmented with additional functionality; and
- allows for the interchange of data freely with other systems; and
- provides documented web services and APIs.

The City desires the architecture of the proposed solution to be open, please refer to Annex 3 – IT Architecture, for the City's application architecture expectations.

The City emphasizes delivering value to its citizens by implementing proven Commercial Off-The Shelf (COTS) applications which are designed to meet specific business needs. Solutions that require extensive customization or 3rd party applications (that are not part of the prime vendor contract) are discouraged.

Cloud-based or Software-as-a-Service solutions will be considered, and are subject to additional security considerations.

3 REQUIREMENTS

3.1 PROVEN SOLUTION

The City prefers to procure a system that is proven in the market; therefore, the Proponent's proposed solution should meet these criteria:

1. The current version must be in full production for a period of at least 6 months; and
2. Current solution must be utilized in at least two (2) government, utility or commercial organizations of similar fleet size and complexity as the City, and have been fully operational for a minimum of one (1) year

NOTE: Prototypes, or items in test-production, and/or not formally announced for market availability will be accepted by the City for consideration and evaluation under the terms of this RFP, but with a further risk analysis.

3.2 SOLUTION REQUIREMENTS

All solution requirements are documented in two Excel spreadsheets (Annexes 2 and 3) which contain the following:

- Annex 2 – Detailed Functional Requirements
  - 1.0 Overall Solution and References
  - 2.0 Global
  - 3.0 Asset Management
  - 4.0 Maintenance Program Management
  - 5.0 Work Management
  - 6.0 Maintenance Execution
  - 7.0 Materials Management
  - 8.0 Maintenance Planning & Scheduling
  - 9.0 Claims Management
  - 10.0 Financial
  - 11.0 Customer Service
  - 12.0 Reporting
  - 13.0 Training & Documentation
  - 14.0 Optional Functions

- Annex 3 – Detailed Technical Requirements
  - 1.0 IT Architecture
  - 2.0 IT Standards
  - 3.0 Support
  - 4.0 System Technology
  - 5.0 Integration
  - 6.0 Data Management
  - 7.0 Cloud Option

Annex 4 – Scenarios contains six (6) scenario descriptions selected to illustrate situations of interest to the City.

3.3 FREEDOM OF INFORMATION AND PROTECTION OF PRIVACY ACT (FOIPPA)

Some information contained within the Fleet Management Information System may be considered sensitive by the BC Privacy commission; the City has a responsibility to the Public that all information contained within the solution is input, stored, accessed and destroyed in accordance to BC FOIPPA legislation.

The Proponent must comply with all Canadian security and privacy policies.

i. BC's Personal Information Protection Act, SBC 2003 c. 36

ii. Federal Personal Information Protection and Electronic Documents Act, SC 2000 c 5

iii. Freedom of Information and Protection of Privacy Act, RSBC 1996, c 165 (FOIPPA)

The City will consider both an in-house and a cloud-based solution architecture. To adhere to the privacy legislation, all data centres of a cloud-based solution must be hosted in Canada. All cloud-based proposals will require an addition questionnaire to be completed during the short-list review process.

4 PROJECT MANAGEMENT AND SOLUTION DELIVERY SERVICES

4.1 OVERVIEW

4.1.1 Project Approach

Within fifteen (15) business days of the City's written notification of contract award to the Proponent, the Proponent shall provide an initial Project Implementation Plan & Schedule (PIPS). The deliverable shall describe in detail the milestones, task responsibilities, and time frames for: system configuration, installation, integration, testing, training, and full system cut-over for implementation.

4.1.2 Project Planning Phase

The project kick-off meeting will begin the Planning Phase of the project. This effort will establish the approach to the configuration and implementation of the Proponent's solution. During the kick-off meeting, the Proponent and the City will jointly discuss timing and staffing issues that will impact the timeline. The result of the sessions shall be an updated implementation plan and schedule. The City will approve the sequence of implementation following the completion of the Project Planning Phase.

4.1.3 Project Communication Platform

The selected Proponent and the City Project team will be required to share information, messages, and documents. The Proponent shall be responsible for the creation and maintenance of a collaborative environment which is available to both the City project team members and the Proponent project team members. Both the City and Proponent Project Managers will have access within the project communication platform to add, edit, and remove members of their teams. All project deliverables and documents will be stored in a location accessible to both teams.

4.1.4 Project Deliverable List

The following table identifies the expected timeline of the project deliverables to be provided by the Proponent to the City. Items are to be delivered to the City within the number of calendar days listed in the due date column. Deliverable due dates are dependent upon the City's issuance of a written notification of contract award, the timing of the deliverable due date shall be expressed in terms of date of written notification of contract award + X calendar days. The Proponent's ability to invoice will be measured against the completion of written and accepted deliverables.

Table 4 - Deliverable Timetable

Deliverable #	Deliverable Title	Due Date
1	Written Notification of Contract Award (issued by the City)	
2	Project Implementation Plan and Schedule (PIPS) – Initial • To be maintained by the proponent	NTP+15
3	Gap Analysis Document *	*
4	Solution Design Document (SDD)* Assuming that there are gaps in functionality and customization will be required	*
5	Solution Testing Plan (STP) – includes functional testing & user acceptance testing	*
6	Solution Acceptance Criteria - Initial	*
7	Solution Administration Guide	*
8	Integration and API Procedure Details	*
9	Solution User Guide	*
10	Solution User Training Plan	*
11	Solution Issues and Defect Report	*
12	Solution Test Results Report	
13	Deliverable Delivery Confirmation Log • Solution Receipt • Acceptance Report	*

Note: The asterisk (*) denotes the dates will be determined and included in the Proponent's Project Implementation Plan and Baseline Schedule (PIPBS). At a minimum, the Proponent's PIPBS shall have each of the above deliverables specified above in its submitted document.

4.2 PROJECT IMPLEMENTATION PLAN AND SCHEDULE - DETAILS

4.2.1 The Proponent is responsible for the development and maintenance of the Implementation Plan and Schedule, which, at a minimum, must include:

a) Scope and goals of the Implementation Plan;
b) Advantages and challenges, assumptions, and prerequisites of proposed approach;
c) Expectations from City;
d) Detailed timeline;
e) Sequence of deployment tasks;
f) RACI Matrix (Responsible, Accountable, Consulted, Informed); and
g) Sequence and schedule of implementation.

4.2.2 The plan should also take into consideration, and include all aspects of business unit & project team readiness such as:

a) Schedule & Availability;
b) Change management;
c) Communication activities;
d) Providing user support post Go-Live;
e) Identifying and resolving impacts;
f) Testing;
g) Training;
h) Interfaces;
i) Hardware; and
j) Reports & Analytics.

4.2.3 The Proponent shall execute the Implementation Plan as approved by the City.

4.3 CITY'S RESPONSIBILITIES

The City shall provide the following:

4.3.1 **Steering Committee.** The project oversight body is made up Managers and Directors representing the City.

4.3.2 **Project Business and Technical Support Group.** The project working group is made up of the key stakeholders from the City's business and technology groups.

4.2.3 **Project Management. The** City will assign a dedicated Project Manager to serve as a single point of contact to the Proponent. The City's Project Manager's duties include, at a minimum:

- Coordination of project plan development;
- Schedule coordination;
- Management of City's project team;
- Monitoring and facilitating approval of deliverables;
- Authorizing payment of invoices, pending approval of deliverables;
- Assuring Proponent is provided with sufficient access to both technical and business knowledge experts to maintain the project schedule;
- Providing project status reports to City governance authorities; and
- Providing City Change Management documentation.

4.3.4 **City Project Resources.** The City shall provide relevant resources to support the implementation of City's components within the Proponent proposed solution. **Note:** The Proponent is responsible for describing the resources required to be provided by the City, by developing a RACI matrix within the project plan deliverable and specifying any other required resources. The City will make reasonable efforts to provide the requested resources.

4.3.5 Coordination of all project meetings between the Proponent and applicable City functional and IT technical team members.

4.3.6 Work space, electrical power, and associated physical device connectivity within City's facilities for Proponent personnel, where required.

4.3.7 Network-related troubleshooting as it relates to the implementation of the solution, with assistance from the Proponent as necessary and as requested by the City.

4.3.8 **Solution Integration with City Applications. The** City shall provide an Integration Team and Services responsible for:

- Assisting the Proponent in validating the solution integration capabilities

4.3.9 **Solution Testing.** The City will participate in the testing process by providing input into the development of testing success criteria.

4.3.10 **Change Approval.** The City Project Manager will have the sole approval authority for any Prime Contractor- or subcontractor- requested changes which impact the scope, cost, or timeline of the implementation and general roll-out. The City Project

Manager shall validate and obtain required City approvals before any requested changes, as described above, can be made.

4.4 PROPONENT'S RESPONSIBILITIES

4.4.1 **Prime Contractor.** The Proponent (Prime Contractor) will be responsible for contract performance, and any subcontractors used. Any subcontractors and their alternates must be clearly and visibly identified by name, and must abide by all terms and conditions of the contract between the City and the Prime Contractor. If subcontractors are to be used, the Prime Contractor must clearly explain the subcontractors' roles and responsibilities.

4.4.2 **Subcontracting.** Any contract resulting from this RFP shall not, either in whole or in part, be subcontracted, assigned, or otherwise transferred to any other Contract without prior written approval by the City. The Prime Contractor shall be directly responsible for any subcontractor's performance and work quality when used by the Prime Contractor to carry out any of the scope of work. The Proponent must ensure that subcontractors do not breach any terms and conditions of the contract between the City and the Prime Contractor.

4.4.3 **Solution Installation and Integration.** From an integration perspective, the Proponent will be responsible for:

a. Providing, configuring and installing (if necessary) all aspects of the Solution, and any additions deemed necessary, to enable the system to operate according to all mandatory and desirable functional, technical, and system level performance specifications presented herein and in the RFP Attachments;

b. Where the proponent has a proven integration solution with existing city applications, they will be responsible for providing the framework and technology to enable integration between the Solution and City applications;

c. Configuring the proposed solution to the City's requirements;

4.4.4 **Proponent Solution Testing.** The Proponent is required to plan, execute and verify testing of the proposed Solution, including, but not limited to:

1) Creating an end-to-end test plan for review and approval by the City;

2) Coordinating with the City to document the solution acceptance criteria for each project implementation phase;

3) Unit-testing of all hardware, customizations and user interface(s);

4) Demonstrating functionality of all Solution components;

5) Demonstrating accomplishment of functional and non-functional requirements;

6) Demonstrating reporting and analytic capabilities which address the quantifiable business benefit tracking;

7) Validating integration between the proposed Solution and City applications;

8) Load- and performance-testing;

9) Demonstrating high availability and failure recovery mechanisms, including:

   - Fail-over and fall-back of data centre systems (if hosted);
   - Restoration of services to a cold-standby site (if hosted);
   - Device recovery in the event of power and/or signal loss; and
   - Stress testing.

10) Security and penetration testing; and

11) Demonstrating service-desk and troubleshooting procedures.

4.4.5 **Project Management.** The Proponent shall designate a Project Manager who will be responsible for management, oversight, delivery, coordinating resolutions to the project and any associated issues. The Proponent's Project Manager will also be the primary/single point of contact for Proponent communications related to the project. For the period from contract initiation, through to the end of the Proponent's Solution's acceptance period, the Proponent's Project Manager shall provide weekly project status reports, which, at a minimum, shall include:

a) Significant work plan tasks performed during the reporting period, and a review of the completed tasks and comparing to plan;
b) Identifying project risks and documenting recommendations to mitigate such risks;
c) Deliverables completed during the reporting period. Identifying milestones reached and comparing to plan;
d) Significant work plan tasks planned for the next reporting period;
e) Deliverables expected to be completed in the next reporting period;
f) Identifying problems or issues and tracking status of problems/issues;
g) Documenting what mitigation effort and plan is being done to achieve resolution of problems/issues; and
h) Project notes and comments.

4.4.6 The Proponent must provide well-trained technical, support, and consulting staff that keep current with the latest technologies, and are fully knowledge in the Proponents' Solution, its features, configuration, and integration.

4.4.7 The Proponent shall be required to be on-site for the duration of the system cutover to the live production system, and the Proponent shall identify any requirements for Proponent on-site presence during post-implementation.

4.4.8 The Proponent shall use existing documentation provided by the City (such as functional business and technical requirements). The Proponent shall ensure that the Solution is in compliance with the City's bylaws and the Solution meets the solution requirements.

4.4.9 Compliance with the following at all times, when conducting activities within any City facility:

a) Provisions of all applicable directives of the City and its agencies;

b) Regulations of City Security Standards; and

c) All applicable Federal, Provincial, and Municipal statutes, ordinances, laws, regulations, codes, directives, and/or orders.

4.4.10 Participate in meetings with City's Project Business and Technical Working Group and/or Project Team, as directed by the City's Project Manager.

4.4.11 Communicate the delivery schedules of all Solution delivery implementations to allow the City the ability to track installation and to coordinate testing and acceptance. The delivery shall correspond to the Project Implementation Plan and Baseline Schedule (PIPBS) as per the requirements of this RFP.

4.4.12 Implement all aspects of the solution, to support the City's implementation and general roll-out of the solution.

4.4.13 Comply with the City's Change Control and Configuration Management procedures, including any configuration or customization requirements not specified within this document. The Proponent will be responsible for notifying the City's Project Manager to coordinate approval of any proposed Change Requests, or Configuration Management updates prior to installation.

4.4.14 Coordinate all project-related activities through the City's Project Manager.

4.4.15 Ensure timely and accurate identification and notification of issues, problems, and defects in the Solution, work plan, or any other effort related to the project's scope of work, or the Solution.

4.5 PROPONENT'S KEY PERSONNEL

4.5.1 The Proponent shall provide the key personnel identified below. Key personnel must be available when necessary to meet the requirements of the solution. The Proponent may not assign key personnel to other Proponent projects in any way that results in a conflict in their ability to meet the requirements of the contract. Nor should the Proponent propose any key personnel in a dual role (such as the Project Manager also as the Senior Application Systems Specialist). The Proponent shall provide those individuals accepted as key personnel throughout the contract term, except as provided in "Substitution of Key Personnel" Section 4.5.2 below.

Key Personnel Qualifications

a. The Proponent shall certify that key personnel meet the qualifications identified in this RFP (refer to "Qualifications for Key Personnel" Section 4.5.3 for further details);

b. The Proponent shall provide a brief professional resume for each Proponent proposed resource; and

c. On a case-by-case basis, Proponent key personnel may be interviewed and approved by the City for performance in multiple skill categories for which they are qualified.

4.5.2 **Substitution of Key Personnel**

a. Stability of key personnel is critical to project success. For this reason, the Proponent shall retain key personnel interviewed and accepted by the City for a minimum period beginning from the receipt of a written notification of contract award and a Purchase Order, and ending upon successful implementation. All proposed substitutes for key personnel, for reasons other than emergency situations (illness, death, emergency resignation, or emergency disciplinary termination), shall be submitted in writing at least ten (10) business days in advance of the substitution, and the nominated individuals must be approved by the City's Project Manager prior to the proposed substitute's commencement of work on the Project;

b. The Proponent shall permit the City to interview and accept any proposed substitute for a key employee. The resume of any proposed substitute shall be signed by the substitute and by the Proponent's Project Manager and the resume of the previous key employee shall be provided for comparison purposes;

c. The City's Project Manager must agree to the substitution in writing before the substitution becomes effective;

d. Any proposed substitute for a key employee shall have qualifications at least equal to those submitted in Proponent Personnel Resume. The responsibility for illustrating this comparison belongs to the Proponent; and

e. If one or more key personnel are unavailable for work under the contract for a continuous period exceeding ten (10) business days, the Proponent will be required to immediately provide written notification to the City's Project Manager, and at the city's discretion, to replace the personnel with approved substitutes of equal or better qualifications within ten (10) business days after providing the City's Project Manager with the written notification.

4.5.3 **Qualifications for Key Personnel**

a. **Project Manager (PM) -** The PM is assigned the management of the Proponent's proposed solution, and project for the work performed under the contract. S/he performs day-to-day management of the project, identifies issues and risks, and recommends possible issue and risk mitigation strategies associated with the project. The PM acts as a facilitator between the City and the Proponent. The PM is responsible for ensuring that work performed under the contract is within scope, consistent with requirements, and delivered on time and on budget. Identifies critical paths, tasks, dates, testing, and acceptance criteria. The PM provides solutions to improve efficiency (e.g., reduce costs while maintaining or improving performance levels), monitors issues and provides resolutions for up-to-date status reports, and demonstrates excellent writing and oral communications skills;

b. **Senior Application Systems Specialist** – Must ensure the performance and integrity of the application servers, databases, interfaces and components. Also responsible for backup/failover configuration. Provisions testing and staging environments, and configures phased deployment processes. Participates in system configuration and integration design, using deep knowledge of the application's APIs and web services.

c. **Business Analyst/System Implementer -** Must be able to analyze information and business requirements. Must be able to evaluate problems in workflow, organization, and planning. Develops appropriate corrective action. Ensures the proposed Solution interface, reporting, analysis tools, integration parameters and processes address the business needs for the system. This role will also be integral to the Change Management process, planning and implementing the transition from the existing system to the new one.

d. **Data Conversion Lead** – Must determine the methods by which existing data for assets, parts, maintenance history, warranties, allocations, billing and other items will be copied to the new database. This role will involve extracting data from SQL databases, Access databases, spreadsheets and text files.
e. **Report Developer** – Must be able to design and produce the reports required for a wide range of stakeholders. The Report Developer is responsible for simple data outputs, daily status reports, complex reports with drill-down capability, charts, and schedules for multiple media, subscription and delivery options.
f. **Integration Architect** - The Integration Architect is responsible for ensuring that the proponent's Solution effectively communicates via published API's using industry standard programming languages. In particular, this role will need to assure integration capabilities to the City financial systems for billing (SAP).

5 TESTING, TRAINING, IMPLEMENTATION AND ACCEPTANCE

5.1 TESTING

Within the Solution Test Plan deliverable, the Proponent shall describe the procedures for such testing, as well as how the Proponent will support the following testing methodology and timeline to incorporate the following test types and scenarios.

5.1.1 Develop Solution Test Scripts and Expected Outcomes

The Proponent must develop detailed system test scripts and expected outcomes from the detailed design documents and the Solution Test Plan, which should include the following:

a) Test scripts and expected outcomes encompassing all modules and business functionalities for each project phase;
b) Submit a comprehensive test data set, aligned to the test scripts and expected outcomes.

5.1.2 Conduct Solution Testing

a) The City and Proponent are responsible and accountable for conducting system testing of the proposed Solution (detailed and stress tests);

b) For the duration of the lifespan of the solution, the Proponent should support a development and/or testing environment, in which new hardware, functionality, reports and workflows will be tested by the business prior to implementation in a Production environment.

c) Depending on the origin of any issues arising from the test events, the Proponent must resolve all issues (defects), under their control, that are discovered during system testing. Any issues (defects) discovered that are under the City's direct control, the Proponent must assist and provide direction to ensure the defect resolution.

d) All test scripts and scenarios, which do not pass the system testing, must be addressed to the City's satisfaction prior to implementation.

e) The Proponent must log and track all defects until resolved in a defect-tracking tool, which will be available to the City project team for update and comments.

f) Based on the tests performed, the Proponent must develop a Solution Test Execution Report, which includes Testing Defects and Issues Log; and

g) The City will verify that the system testing process and testing results are in accordance with the System Test Plan and report any deviations. The Proponent must support the City during the assessment. The Proponent must implement a mutually agreed scope of work based on the project phase testing results.

5.1.3 **Solution Test Execution Report.** At the conclusion of Solution Testing phases, the Proponent shall provide a test report and delivered to the City within five (5) business days of the testing phase conclusion that includes:

a) Completed and signed checklists documenting the successful performance of each inspection or test;

b) A detailed schedule for discrepancy correction and retesting;

c) A lessons learned document indicating what went well, and what did not, in the performance of the particular testing phase; and

d) A list of updates/revisions needed to the testing plans for any subsequent testing/retesting phases.

5.1.4 **Verify/Validate Stress Testing Process and Results.** The City will verify that the testing process and testing results are in accordance with the Test Plan and will report any deviations.

5.1.5 **Testing Data and Software.** The Proponent shall specify any requirements necessary for testing. The Proponent shall be responsible to create test data for all testing phases. The Proponent must provide a method that can be used for logging test cases and for defect tracking and resolution process (logs all test cases, results, and issue

resolution). Sufficient time must be allocated to train City personnel on the testing expectations and procedures.

5.1.6 **Develop/Provide User Acceptance Test plan.** A User Acceptance Test ("UAT") Plan shall be created by the Proponent, with the assistance of the City acting as the primary guide for the execution of the User Acceptance Testing activity for all interfaces that the business or drivers will interact with. The user test scripts and scenarios will cover the complete Solution, all City modules, and interfaces.

5.1.7 **Execute User Acceptance Test.** A coordinated UAT where City project team and the Proponent will conduct user acceptance testing on the solution, based on test scripts provided by the Proponent.

If defects are identified during user acceptance testing, the Proponent shall address the defect and the Proponent will be responsible for implementing a mutually agreed scope of work based on the project phase testing results.

The Proponent is also responsible for updating all application and user documentation to be consistent with code that has been accepted and that will be promoted to the production environment.

5.1.8 **Testing Support**

The Proponent shall:

a) Conduct functional testing to ensure the data produced from the proposed solution addresses the scope of work of the project phase;

b) Provide on-site assistance to the City during Functional, Integration, and User Acceptance Testing of the solution for each project phase;

c) Provide error handling and disaster recovery procedures, which ensure the components of the application work in accordance with City requirements; and

d) The Proponent shall be required to update the testing plans and procedures based on feedback from the City, and provide the revised/updated plan(s) to the City at least five (5) business days prior to performance of the testing processes described above.

5.2 TRAINING

5.2.1 **Develop Training Plan**. The Proponent must develop a comprehensive Training Plan Deliverable which must include/describe, at a minimum:

a) the prerequisite user knowledge required prior to beginning training, as well as expected learning objectives, areas of focus and outcomes for each component of the training;

b) details regarding the required materials, amount of time and expected learning objectives of each training course;

c) differences based on the area of focus of the training; and

d) Recommendations as to training details (how many per session, how long for each session, required materials & technology).

5.2.2 **Conduct Training.** The Proponent shall provide onsite training services for the following service types:

- Installation, system maintenance and troubleshooting,
- Solution Management: Administrative and configuration services,
- General operation of the user interface
- End-user training for specific roles, e.g. Service Writer, Mechanic, Stores Clerks,
- Reporting and Analytics,
- System integrations using APIs or web services,
- Train the trainer.

The proponent shall be responsible for all training aids and manuals to be provided to each attendee; copies of training aids and manuals are also to be provided in electronic format.

The proponent is expected to provide cost details for further training sessions (please include details for on-site and remote training opportunities).

5.3 IMPLEMENTATION

5.3.1 During the solution implementation, the Proponent shall provide the following:

a) Complete and timely installation, and coordination of all Installation processes with the City's Project Manager;

b) Confirm all Project Scope of Work and Mandatory requirements for the solution have been met or addressed;

c) Prior to solution implementation, the Proponent shall ensure that all the deliverables described in the proposal documents have been approved and accepted by the City's Project Manager;

d) Training and Issues support is in place to aid the business in the implementation process;

e) Implementation support;

f) Conduct a walkthrough of the solution User Guide and all Training Materials with the City Project Team; and

g) Update the City Project team in a timely manner.

5.4 IMPLEMENTATION SUPPORT

5.4.1 The Proponent shall provide services for "implementation support" activities and those services shall be included in the Proponent's firm pricing established in the cost details form of this document

5.4.2 The Proponent shall provide support staffing during system installation through production go-live, as follows:

a. **Project Manager** – The project manager shall be required to be onsite as needed for critical times of the system's implementation to ensure better quality assurance management of the system's implementation as described in the Proponent's implementation plan. The Proponent's Project Manager must be available by telephone (6am to 6pm Pacific Time) 7 days a week during the "go-live" or transitionary period of the solution;

b. **Support Staff** – Minimum of one (1) FTE on-site, for the initial 48 hours following "go-live"; and

c. **Support Staff** – Following 48 hours after the production go live, and for a period of 30 days, a minimum of one (1) FTE on-call, Monday through Friday (6am to 6pm Pacific Time).

5.4.3 The Proponent shall complete a milestone status report for each significant implementation milestone, stating what was completed and what actions are necessary as a result of the milestone. The City will review and formally accept each

milestone report if the milestone deliverable demonstrates fulfillment of the RFP requirements.

5.5 SOLUTION ACCEPTANCE

5.5.1 Solution Acceptance will occur in five (5) phases:

1. **System Certification:** After implementing the solution any hardware or software (including Software-as-a-Service SAAS) supplied by the Proponent shall be considered complete in accordance with the following criteria:

    - The City and Proponent shall install, test, and make fully operational all products and applications, this includes all hosted components of the application (including: server, operating system, reports and database requirements). The solution shall not be considered complete until the services and equipment are accepted by the City's Project Team.
    - The City and Proponent shall install, test, and make fully operational all hardware supplied by the Proponent, including any mobile/hand-held devices. The solution hardware shall not be considered complete until the services and equipment are accepted by the City's Project Team.

2. **Functional Certification:** For each project phase the Proponent will certify that the Proponent's solution implementation is complete in accordance with project phase scope of work.

3. **Proof of Integration:** The proponent is responsible for ensuring that the solution is capable of integrating with the City's current suite of application integrations (including the capability to integrate via web services platform). To confirm that this has been successful, the proponent must work with City teams to ensure that bi-directional communication between the Proponent's solution and designated City's applications are fully operational.

4. **Production System Documentation**: The Proponent shall deliver "as built" online or otherwise electronic and hard copy documentation, clearly describing actual implementation configurations, settings, customizations, and complete installed solution documentation.

5. **60-Day Reliability Test:** The duration for the Performance Period for Acceptance shall be sixty (60) calendar days and shall begin after:

a) Configuration and Implementation of the solution user interface has been deployed in a Production Environment for a period of 60 calendar days;

b) No major bugs or defects have been reported to the proponent in the implemented solution for a period of 35 days;

c) Successful completion of User Acceptance Testing; and

d) City users have been utilizing the application for a minimum of sixty (60) days.

Criteria for Success:

- No major defects or bugs within the solution has been reported
- Solution uptime is consistent with SLA parameters
- Support response is consistent with SLA parameters
- All functions implemented within the project phase scope of work continue to be functional

Outcome:

City's Project Manager will issue a written notice to the Proponent of either completion or failure of the 60-Day Reliability Test.

In the event that the 60-Day Reliability Test has been unsuccessful, the City Project Manager will identify the areas which were unsuccessful and negotiate with the Proponent on an acceptable solution – upon which the application will then re-enter the Performance Period for Acceptance for and repeat if necessary until successful.

5.5.2 Solution Acceptance Phase Completion

After all System Acceptance benchmarks have been achieved – the Proponent is expected to provide city staff with a Solution Acceptance Report, which documents benchmarks, significant achievements, deliverables and signoffs, for the phase of project implementation.

Upon City receipt and acceptance of the Solution Acceptance Report from the proponent – the project will enter a sustainment phase, in which all components have been installed and the solution deemed to be stable.

6 MAINTENANCE SERVICES AND LEVEL OF SUPPORT

6.1 TECHNICAL SUPPORT

The Proponent must describe their process and services for providing support for the proposed solution (including technical, hardware, and data, reporting and billing inquiries). At a minimum, the City requires the Proponent to provide solution support that will have a maximum response time of 60 minutes weekdays (7:00am – 5:00pm Pacific Time).

6.2 SYSTEM SUPPORT SERVICES

a. The Proponent must provide system maintenance (e.g., upgrades, enhancements, new releases, etc.) and technical support for all products/services in accordance with the requirements within this RFP, including ongoing unlimited technical support problem determination and resolution;

b. The Proponent shall provide recurring application maintenance for the proposed solution, for an initial five (5) years (with an option to extend the maintenance of the solution for a further term– to be reviewed on an annual basis);

c. All expected costs for such maintenance support shall be provided within the Costs table associated with this document. The proponent will also identify a maximum annual increase rate for maintenance services – which will be identified as a percentage - future maintenance cost should not exceed percentage identified within the table. All cost increases must be well documented and subject to negotiations;

d. The Proponent must provide for any upgrades to the system components to accommodate and maintain the solution customizations developed within the scope of the project phases (or contracted with the proponent in a change request). Updated Solution documentation must be provided to the City concurrent with installation of any upgrade or revision to the system, unless otherwise agreed to by the City;

e. For a cloud hosted solution, the Proponent must fully test and resolve any solution deficiency on upgrades prior to installing/implementing the upgrades into production;

f. The Proponent must ensure that upgrades may be rolled-back. There must be a back-out strategy if an upgrade fails. In performing the regression testing on a new version/upgrade of the solution, the Proponent must certify in writing to

the City that all the previous (old) solution capabilities still work in accordance with the contract requirements;

g. Maintenance services shall include, at a minimum, the detection and correction of solution errors discovered by the City or otherwise made known to the Proponent. The Proponent agrees to respond to the City's inquiries regarding the use and functionality of the solution as issues are encountered by system users;

h. For a hosted solution, System Maintenance shall also include all services necessary to maintain at least a 99% solution operational uptime, redundancy, and recovery services described herein for all products provided by the Proponent, as well as the resolution of system errors, malfunctions, and system restoration. Scheduled downtime for maintenance or upgrades shall not be included in the calculation of system production uptime;

i. The Proponent will describe their ability and approach to updating the solution, and configuration settings; and

j. If investigation and research is required by the Proponent's technical staff, and the problem cannot be resolved or question answered immediately, then the Proponent's help desk/technical support staff should notify City representatives within two (2) hours and produce a report progress on the problem's resolution (in electronic format) to City personnel. The Proponent must continue to update City staff on progress of the problem's resolution. The Proponent will be provided with a ticket reference from the City Support Tracking system and will be required to quote the City ticket number on all correspondence.

6.3 MAINTENANCE LOG

The Proponent shall keep a log of all maintenance/technical support calls made to the Proponent's Help Desk/technical support personnel and document the complaints and problems reported to the help desk system whether made either by a City resource, or by the Proponent. The log shall be made available to the City as part of monthly or quarterly reporting, as well as any other time upon request by the City. This report(s) shall be delivered to or made available to the City no later than by the end of business (5:00 p.m. Pacific Time) on the fifth calendar day of every month. The log must at a minimum contain the following information:

a. Time of incident notification;

b. Name of City resource;

c. City Ticket Number;

d. Proponent Ticket Number;

e. Description of Reported Problem/Complaint;

f. Indication of whether the problem/compliant was resolved at time of call;

g. Description of any follow-up investigation/resolution plans;

h. Date of and Description of Final Resolution;

6.4 LEVEL OF SUPPORT

a. The Proponent shall provide support services for the proposed Solution. The services proposed by the Proponent must include, but are not limited to, the following issues:

- **Escalation Procedures:** The Proponent shall provide a copy of the Proponent's trouble escalation procedures as well as describe the process and procedures that would be utilized by City personnel when issues require escalation. The Proponent must maintain this information with correct and current data during the course of the maintenance period;

- **Installation, Verification and Validation:** The Proponent is required to provide support during testing phases of new releases of the application;

- **Application Defects:** The Proponent is required to provide resolution to all confirmed application defects within 30 days or a negotiated time period;

- **Upgrade Support:** The Proponent must offer, for the full term of the maintenance agreement, support of the proposed solution to ensure continued operation during and after upgrades and implementation of new releases of all user interface applications covered under the maintenance agreement;

- **Enhancements:** The Proponent must provide enhancement updates to the user interface applications as they become available or as requested by the City. Please describe the method of distributing information on the available updates and software modifications with an explanation of the responsibilities of the Proponent and the City.

b. Through solution support, the Proponent ensures that the solution shall remain compatible with the current and future City operating system software (Windows 7+), web browser (IE 11+ and Chrome) or any third party software used in direct association by the proponent with the developed solution;

c. Solution support includes updates and modifications as required as a matter of federal, provincial or municipal law and or regulation in connection with City's compliance standards; and

d. The Proponent shall comply with City Change Control Process for testing and implementing solution related changes into the production environment. This process consists of thorough solution testing in the Development/Testing Environment. Following testing and acceptance, the system may be loaded into the Production Environment.

7 SECURITY REQUIREMENTS

7.1 PROPONENT SECURITY REQUIREMENTS

7.1.1 The integrity and security of the data communications are fundamental components of all applications procured by the City and, accordingly, the City has implemented security processes and procedures that foster and safeguard the data integrity within all its applications. During the proposal evaluation process, a shortlist of proposals will be developed based on written submission, financial (total cost of ownership) & reference evaluations. Shortlisted Proponents will be required to answer a Security Questionnaire which will be provided when the proponent has been notified of their short-listed status.

7.1.2 Proponents must complete and submit the Security Questionnaire, as well as comply with City Information Technology security policies and procedures herein regarding access to its networks and physical facilities;

7.1.3 Authorized Proponent staff may require secured remote access privileges into the configuration; City IT staff reserves the right to monitor all remote access activities;

7.1.5 The Proponent shall comply with, and adhere to, all relevant City Policies and Standards. These policies may be revised from time to time and the Proponent shall comply with all such revisions. Current and revised versions of the security policy will be made available to the Proponent, following contract award;

7.1.6 The Proponent shall complete all required paperwork for security access if access is needed to the City's Information Technology LAN/WAN, as directed and coordinated with the Project Manager;

7.1.7 Any Proponent employee, who is assigned to the Contract, and will be in and out of City facilities on a daily basis, must participate in a City security awareness, occupational health & safety orientation and training session; and

7.1.8 At all times, at any City facility, the Proponent's personnel shall ensure cooperation with City site requirements to include being prepared to be escorted at all times, and providing information for obtaining a badge and wearing the badge in a visible location at all times.

7.1.9 The integrity and security of the data storage (when being collected, in transit and within the application) is of paramount importance to the City; the Proponent and the Solution must adhere to industry best practices in terms of data encryption, data transmission and key management.

8 SUBMISSION FORMAT

Table 5 - Expected Submission format of the Proposal outlines the expected submission order of the Proposal. Submit a document which follows the Section number and Titles as outlined below.

Table 5 - Expected Submission format of the Proposal

Section Number	Section Title	Proposal Content Reference Details
1.0	OVERVIEW	Title Page Table of Contents Executive Summary (refer to Annex 1 – Schedule of Requirements, Section 9.1 - Executive Summary)
2.0	PROPONENT OVERVIEW	Refer to Annex 1 – Schedule of Requirements: Section 9.2– Understanding of Solution being sought by City; and Section 9.3 – Proponent's Experience, Expertise and References
REQUIREMENTS		
3.1	FUNCTIONAL PROPOSAL	Refer to and complete Annex 2 – Detailed Functional Requirements: ▪ 1.0 References ▪ 2.0 Global ▪ 3.0 Asset Management ▪ 4.0 Maintenance Program Management ▪ 5.0 Work Management ▪ 6.0 Maintenance Execution ▪ 7.0 Materials Management ▪ 8.0 Maintenance Planning & Scheduling ▪ 9.0 Claims Management ▪ 10.0 Financial ▪ 11.0 Customer Service ▪ 12.0 Reporting

		▪ 13.0 Training & Documentation ▪ 14.0 Optional Functions Annex 2A - Response Addendum for Annex 2
3.2	TECHNICAL PROPOSAL	Refer to and complete Annex 3- Detailed Technical Requirements: ▪ 1.0 IT Architecture ▪ 2.0 IT Standards ▪ 3.0 Support ▪ 4.0 System Technology ▪ 5.0 Integration ▪ 6.0 Data Management ▪ 7.0 Cloud Option Annex 3A - Response Addendum for Annex 3
3.3	SCENARIO RESPONSES	Refer to and complete Annex 4 – Scenarios: ▪ A – Found Work & Downtime Calculations ▪ B – Sublet Quotes & Approvals ▪ C – Planning for Seasonal Capacity Changes ▪ D – Truck Fleet Planning ▪ E – Inventory Planning ▪ F – Invoice Processing
4.0	KEY PERSONNEL & REFERENCES	Refer to Annex 1 – Schedule of Requirements, Section 4.0 – Project Management and Solution Delivery Services, Sub-section 4.5 - Proponent's Key Personnel
5.0	PROJECT IMPLEMENTATION PLAN AND SCHEDULE	Refer to Annex 1 – Schedule of Requirements, Section 4.0 Project Management and Solution Delivery Services, Sub-section 4.2 Project Implementation Plan and Schedule – Details.

PART C - APPENDICES		
6.0	PROPOSAL FORM	Complete and execute RFP Part C – Form of Proposal, Appendix 1 – Legal Terms and Conditions of RFP.
7.0	COMMERCIAL PROPOSAL	Complete RFP Part C – Form of Proposal, Appendix 3 – Commercial Proposal
8.0	REFERENCES	Complete RFP Part C – Form of Proposal, Appendix 4 - References
9.0	INSURANCE	Complete RFP Part C – Form of Proposal, Appendix 5 – Certificate of Insurance, and, if applicable, attach Proof of WorkSafeBC Registration (refer to Part C – Form of Proposal, Appendix 13).
10.0	DECLARATION OF SUPPLIER CODE OF CONDUCT COMPLIANCE	Complete and execute RFP Part C – Form of Proposal, Appendix 6 – Declaration of Supplier Code of Conduct Compliance form.
11.0	SUSTAINABILITY	Complete RFP Part C – Form of Proposal: Appendix 7 – Corporate Sustainability Leadership Questionnaire; and Appendix 8 – Sustainability Requirements Questionnaire
12.0	PERSONAL INFORMATION CONSENT FORM(S)	Complete and execute RFP Part C – Form of Proposal, Appendix 9 – Personal Information Consent Form(s).
13.0	SUBCONTRACTORS	Complete RFP Part C – Form of Proposal, Appendix 10 - Subcontractors
14.0	DEVIATIONS AND VARIATIONS	Complete RFP Part C – Form of Proposal, Appendix 11 – Proposed Amendments to Form of Agreement, if any. If none, state that the Proposal is fully consistent with the Form of Agreement.
15.0	FINANCIAL STATEMENTS	As required in RFP Part C – Form of Proposal, Appendix 12 – Financial Statements, attach Proponent's Financial Statements for at least the prior two years.

16.0	CONFLICTS; COLLUSION; LOBBYING	Complete RFP Part C – Form of Proposal, Appendix 14 – Conflicts; Collusion; Lobbying.

9 WRITTEN PROPOSAL SUBMISSION REQUIREMENTS

9.1 EXECUTIVE SUMMARY

The Proponent should provide an Executive Summary that provides the City Evaluation Committee and City Management with a collective understanding of the contents of the entire Proposal.

The Executive Summary should briefly summarize the strengths of the Proponent and their subcontractors, and the key features of the Proponent's proposed approach to meet the requirements of the RFP by phase/milestone. The Executive Summary will include highlights of the following:

1. Products and service capabilities;
2. Significant features of the Proponent's services approach;
3. Previous relevant experience; and
4. Financial stability.

The Executive Summary Section should be limited to a maximum of four (4) pages in length.

9.2 UNDERSTANDING OF SOLUTION BEING SOUGHT BY CITY

The Proponent should present their understanding of the problems being addressed by this RFP, the objectives, and the intended results. Proponent should summarize how their proposal meets the requirements of this RFP and why the Proponent is best qualified to perform the work required. The Understanding of Solution Section should be no more than four (4) pages in length.

9.3 PROPONENT'S EXPERIENCE, EXPERTISE AND REFERENCES

Proponents and their subcontractors should clearly describe at least two (2) previous project experiences of a similar nature and complexity in scope, as well as the responsibility and technologies involved. These project summaries should be limited to no more than two pages per project, and should include no more than four (4) project summaries. Contact names and information (i.e. client name, city and country, contact name and title, email address, telephone number, length of relationship) must be provided, to allow the City to perform reference checks.

In addition, in Annex 2 Section 1.0, provide two client references which satisfy the criteria listed in the Section.

The Proponent should also describe the subcontractors' (if subcontractors are proposed) experience in providing the products/services that they will be responsible for providing as part of the Proponent's system solution. Project Summaries for the subcontractors should be limited to no more than two pages per project, and should be limited to three (3) project summaries. Contact names and information (e.g. email address, telephone number) must be provided, to allow the City to perform reference checks.

In providing this information, the Proponent should take into consideration the following areas of interest to the evaluators:

- The quality and relevance of references;
- Demonstration of extensive project management expertise utilizing and adhering to industry-accepted project management methodologies and best practices (e.g., PMI) on previous projects;
- Demonstration of successfully analyzing/understanding the business needs of the customer, offering appropriate solutions to meet/exceed those needs, and extensive experience in designing/configuring a system solution to fulfill the business needs of the customer;
- The ability to successfully implement the solution, as demonstrated by implementation of comparable solutions; and
- Demonstration of extensive experience with projects related to the integration of the proposed solution with other applications, and demonstration of completing a project within the timeframe established by the project schedule.

The City's Evaluation Committee will contact a select number of the references to confirm information. Proponent and Subcontractors should either have satisfactorily completed, or

be completing the qualifying projects, as verified by the references, in order to receive credit for meeting this requirement.

9.4 TECHNICAL AND FUNCTIONAL REQUIREMENTS

9.4.1 Evaluation of the Proponent's Solution's technical and functional capabilities shall be based on the requirements stated in the electronic documents (excel spreadsheets)

- Annex 2 – Detailed Functional Requirements
- Annex 3 – Detailed Technical Requirements
- Annex 4 – Scenarios A-F

The Proponent must fill out and submit both a hard copy and digital copy on USB (in MS-Excel format), the RFP's Requirements, referring to the Legend tab within the spreadsheet for detailed instructions on the expected response from each Proponent.

9.4.2 The Proponent should take into consideration the following areas of interest to the evaluators:

a. The ability of the user interface to increase/streamline access to information;

b. The stated architecture goals and needs as identified within this document; and

c. The ability of the proposed solution to support:

- Critical and Valuable functionality;
- Desirable and Optional functionality;
- Flexibility and capability to add new features, connections and/or data sources in the future;
- The design, capability, and functionality of the proposed technical solution of the Proponent's solution response to this RFP;
- The solution provider's methodology and capability to ensure the least amount of business disruption during implementation.

9.5 VALUE-ADDED SERVICES

Proponents are encouraged to provide descriptions of any additional value-added services that are not already referenced by requirements and/or specifications included within this RFP.

Any value-added services should be presented as optional components with any additional costs for these services indicated in RFP Part C – Form of Proposal, Appendix 3 - Commercial Proposal table. This subsection of the Functional Response section shall provide a comprehensive and written description of the Proponent's approach to all value-added services that may be provided. Each proposed value-added service is to be listed with a detailed explanation.

The Proponent should identify and propose any other elements necessary to successfully execute the project. Specifically, tasks and deliverables that the Proponent believes are important to the project should be included in the proposal and highlighted as additional necessary tasks in accordance with this provision.

9.6 PROPOSED ALTERNATIVES

Alternative proposals may be considered by the City. The alternative proposal must address all of the requirements stated in the RFP, and the Commercial Proposal (RFP Part C – Form of Proposal, Appendix 3) must contain all price information in the format specified in the Pricing table.

10 DEMONSTRATION AND SPECIFIC QUESTIONNAIRE REQUIREMENTS

This section provides requirements for the demonstration of the proposed solution, including completion of a detailed security questionnaire and a demonstration of specific scenarios.

Only short-listed Proponents will be expected to complete the detailed security questionnaire or provide a demonstration, therefore, the detailed security questionnaire and demonstration instructions will be made known to only the short-listed Proponents.

The demonstration will follow specific scenarios provided by the City, to illustrate the proposed Solution capabilities. It is to be delivered via an on-line service, provided by the City, and will be recorded by the City. No on-site presentations will be permitted in this phase of the evaluation.

Proponent's Team

Short-listed proponent's attending the demonstration should include, at a minimum, the following members of the proposed Key Personnel: project manager, and senior resources who will be executing the proposed implementation plan.

11 LICENCE, ANNUAL SOFTWARE MAINTENANCE AND SUPPORT AGREEMENTS

The Proponent shall provide a copy of their standard:

a. Solution License Agreement(s); and

b. Maintenance and Support Agreement;

c. Source Code Escrow Agreement.

The provision of these documents within the Proponent's proposal will serve a two-fold purpose: 1) these documents will enable the City to review the two agreements' respective terms and conditions; 2) these documents may provide details which the City may incorporate into a final form of agreement for execution.

The City may not consider any product or solution which is offered by a Proponent who requires the City to agree to terms and conditions in the Proponent's form of agreement which the City deems not to be in the best interests of the City.