

City of Redmond, Washington
Purchasing Division, M/S: 3NFN
15670 NE 85th Street
PO Box 97010
Redmond, WA 98073-9710

RFP 10799-23
Request for Proposals

Project and Portfolio Management

The City is soliciting proposals from qualified firms to provide Project and Portfolio Management software and implementation to support construction projects at the City of Redmond.

Posting Date: August 28, 2023

Questions Due (via email): September 14, 2023 at 5:00 p.m. (PT)

Proposals Due (via DocuSign): October 5, 2023 at 2:00 p.m. (PT)

The City of Redmond, Washington (the "City") requests interested parties to submit proposals for the above referenced Request for Proposals (RFP).

Background

The City of Redmond, Washington is a suburb of Seattle and hub for residential and employment growth due to its strong technology business sector. The City encompasses an area of over 17 square miles and is located less than 20 miles east of downtown Seattle. The City has three urban growth centers in Downtown, Overlake, and Marymoor, which are expected to grow significantly in the next 20 years. Today, the City has about 75,000 residents and 95,000 jobs, and by 2030, it is expected to have 78,000 residents and 119,000 jobs. The City is interested in acquiring project management software to support the City with managing construction projects to support this growth.

Scope of Work

The City currently manages more than 100 projects in the six-year Capital Investment Program (CIP). At any given time as many as 50 projects are active across all project phases, and a subset of 10-15 are in active construction. Multiple departments are involved in planning, scheduling, managing, inspecting, and reviewing projects. The City currently uses multiple Microsoft products to manage these projects, including Excel spreadsheets, Word documents, SharePoint (document storage and collaboration), and Microsoft Dynamics D365

Finance and Operations (financials/project accounting). The City desires a single system to manage the planning, expenditures, revenues, and progress of its projects, while providing industry best practices and tools including terminology and workflows.

The City desires to select and implement a Project Portfolio Management solution that will provide a single application to manage all projects from a high-level, multi-year strategic planning portfolio view as well as from an individual project view. This application must integrate with the current Dynamics financial solution. The Key Requirements for this software are included as Attachment A.

The ideal proposer should have experience in successfully implementing and supporting the proposed solution at comparable customers with similar requirements to the City of Redmond. The selected vendor will be responsible for the final approved design, configuration, data migration and implementation of the Project and Portfolio Management system, including development of user acceptance testing scripts, training materials, system integration to existing systems, data migration support, and ongoing system support.

Agreement

The City intends to enter into an Agreement consisting, at a minimum, of a Master or Professional Services Agreement, Service Level Agreement (SLA), and Support Agreement (if not contained in another contract document), and a Statement of Work with the chosen vendor.

The City intends to enter into an initial two-year agreement: with three (3) optional one-year renewal terms, for a potential maximum total term of five (5) years, provided that 1) Consultant is in compliance with the terms and conditions of the contract and, 2) that the annual payment is cost-effective as determined by the City, and 3) that sufficient funds have been appropriated by the City. The City reserves the right to cancel this contract at any time, upon thirty (30) days written notice to Consultant.

Should the City exercise a renewal option, the City and Consultant may discuss any necessary changes to services and will confirm price/rates prior to each renewal. Consultant shall notify the City in writing at least thirty (30) days prior to any proposed price adjustment. Acceptance of such a request will be at the sole discretion of the City. (Attachment F)

Project Schedule: Implementation will commence as soon as practical. Please provide an estimated timeline with your proposal. The timeline should include all proposed major milestones. Actual work schedule will be confirmed at the time of contract signing.

Pre-Bid Questions

September 14, 2023 (5:00 p.m. PT). Proposers may gain clarification by submitting questions via email to astenerson@redmond.gov These questions are due no later than

Thursday, September 14, 2023, at 5:00 p.m. PT. The City will provide posted responses no later than Thursday, September 21, 2023, at 5:00 p.m. PT.

Proposed Timeline

The following table outlines the anticipated schedule for this RFP process. The City reserves the right to modify or reschedule milestones as necessary.

| Item | Date |
|-------------------------|----------------------------|
| RFP Announced | August 28, 2023 |
| RFP Questions Deadline | September 14, 2023 |
| Proposals Due | October 5, 2023 |
| Evaluation of Proposals | October/November 2023 |
| Software Demos | November/December 2023 |
| Software Selected | December 2023/January 2024 |
| Contract Negotiation | Q1 2024 2024 |
| City Council Approval | Q1/Q2 2024 |
| Begin Implementation | Q2 2024 |

Proposal Due Date/Time

October 5, 2023, at 2:00 p.m. PT. The City must receive proposals via DocuSign no later than 5:00 p.m. on October 5, 2023. Responses received after such time will be returned unopened.

Proposal Submittal Procedures

City of Redmond utilizes DocuSign for the electronic submittal of bids and proposals. This service is free of charge for bidders and does not require that a bidder have a DocuSign account to complete the signature process. Please refer to the instructions shared in the online posting for this RFP on www.redmond.gov/bids for step-by-step instructions for submitting a proposal.

Response Requirements & Format

All costs for developing a response to this RFP are the obligation of the respondent and are not chargeable to the City. The respondent must bear all costs associated with the preparation of the submittal and of any oral presentation requested by the City. All responses and accompanying documentation will become property of the City and will not be returned. Proposals may be withdrawn at any time prior to the published close date, provided notification is received in writing to the below listed City agent(s). Proposals cannot be withdrawn after the published close date.

Proposals must include all information requested and meet all specifications and requirements outlined in this RFP. The following submittals must be part of your proposal;

if any are not included, your proposal may be judged as non-responsive. A committee will evaluate the submitted proposals.

A complete response will include:

Section 1: Cover letter

- a. Brief overview of Company
- b. Brief overview of Software
- c. Point-of-contact name, position, and contact information
- d. Proposals must be made in the official name of the firm or individual under which business is conducted (showing official business address) and **must be signed** by a person duly authorized to legally bind the person, partnership, company, or corporation submitting the proposal.
- e. Provide a statement indicating the number of calendar days the proposal shall be valid. (The City's minimum number of days is 60.)
- f. Provide a statement to the effect that you understand and agree to obtain a City of Redmond business license as a requirement for performing these services. A City business license application can be found at:
<http://www.redmond.gov/BusinessLicense>.

Section 2: Executive Summary & Overall Approach - Summarize your proposal and include your solution's qualifications and experience. (Limit response to no more than three pages.)

Section 3: Requirements and Pricing - Complete the Key Requirements and Pricing Form (Attachment A). **This must be submitted in MS Word format.** Complete the Security and Technical Requirements (Attachment B). If any service is supplied by a partner or 3rd party, identify the source service provider(s).

Section 4: Customer References - Complete the Customer References Form (Attachment C) to include three similar references for implementations completed within the last three years. Municipal references are preferred. The City reserves the right to contact references without prior notification.

Section 5: Implementation Methodology - Provide a brief overview of your implementation project team, including members, roles and experience level, and methodology and the expected timeframe for this project. Include an overview of your training approach. (Limit response to no more than three pages.)

Section 6: Supporting Documentation: Please provide a copy of your Service Level Agreement (SLA).

The City of Redmond is an active member of the King County Directors Association (KCDA) and several other joint purchasing entities and would be eligible to seek access to any and all price considerations, terms, and conditions outlined in master agreements formed by one of these agencies. If a proposal is based on any of these pricing agreements/arrangements, it shall be the responsibility of the bidder to identify such. It is requested that the City be contacted prior to bid submission if beneficial pricing may be achieved by the City via access to an existing contract with one of these agencies.

Selection and Award

All interested parties are requested to provide a response containing all required elements herein to the City by the deadline given. A selection committee will review and evaluate all proposals, with the intention of selecting a short list of solutions (approximately three) that, in the opinion of the City, provides the best value, as determined by the evaluation criteria listed below. The shortlisted vendors will be invited to move to the next steps in the evaluation process by conducting a scripted demonstration of their solution to the City.

| Evaluation Criteria | Weight |
|---|--------|
| Solution Capabilities - The vendors response should demonstrate how the solution will adequately meet the needs defined in the RFP. The Functional and Technical Tables (Attachment A and B) contain the primary operational criteria that the solution must address. User Interface is modern, and easy to use. The technology platform aligns with the City technology roadmap. The proposer clearly outlines their hours of support, SLAs and escalation levels. | 40 |
| Qualifications of vendor: <ul style="list-style-type: none"> Preferred Qualifications <ul style="list-style-type: none"> • Local government client references • Proven implementation experience with agencies of similar scope and size Required Qualifications <ul style="list-style-type: none"> • Public agency client references • Proven solution - no design build or custom development | 10 |
| Qualifications of implementation team (vendor or third party) <ul style="list-style-type: none"> Preferred Qualifications <ul style="list-style-type: none"> • Local government implementation experience (multiple clients) • On-shore resources • Vendor or partner led implementation, no subconsultants Required Qualifications <ul style="list-style-type: none"> • Public agency implementation experiences similar in size and scope | 10 |
| Key Personnel: Designated resources with relevant education, experience and certifications supporting public sector clients in the following areas: <ul style="list-style-type: none"> Lead PM <ul style="list-style-type: none"> • Coordinate resources • Provide project framework including project plan, risk and issue management Product Owner | 10 |



| | |
|---|----------------|
| <ul style="list-style-type: none"> • Provide industry best practice guidance on system configuration • Understand and interpret business practices to align with system functionality <p>Solution Architect</p> <ul style="list-style-type: none"> • Experience with financial system integrations, Dynamics 365 Finance and Operations preferred • Guide data mapping and migration <p>Lead QA/QC Manager</p> <ul style="list-style-type: none"> • Create and support team in development and execution of test cases • Identify, track and resolve testing issues and errors • Determine quality assurance parameters • Experience with automated testing tools preferred | |
| Project Understanding, Approach, QA/QC - demonstrate project understanding, including how the team plans to address challenges unique to this project. Develop a project-specific approach to managing and delivering this project on time including an implementation schedule. Outline processes and personnel in place to address quality control. | 15 |
| Proposed Fees/Cost - vendor's proposed cost, including all fees and expenses associated with the solution, including implementation, integrations, training, hosting, data migration and on-going maintenance and support | 15 |
| TOTAL | 100 pts |

The City and its consultants may request additional information, conduct clarifying conference calls, ask for a web demonstration, or take any other action it deems necessary in order to review and clarify submitted information for the City evaluation team. The following criteria will be considered:

- Project approach and understanding of the City's objectives and requirements
- Ability to meet the City's functional and technical requirements
- References of similar customers and quality of previous performance
- Implementation timeframe
- Staff availability for the project
- Technical ability to manage a data migration of current and past data from SharePoint and Excel
- Training approach
- Strength and stability of the firm
- Pricing based on five-year total cost of ownership
- Technical experience and strength and stability of proposed implementation team
- Customer support and SLA standards

The City reserves the right to reject any or all proposals for any reason and to waive any irregularities or information in the evaluation process. The final decision is at the City's sole discretion and respondents to this request have no appeal rights or procedures guaranteed to them.

The City reserves the right to re-evaluate firms who were not originally shortlisted at any time before the determination of a finalist is made. Upon notification of an intent to award, the City reserves the right to limit the period of contract development to ninety (90) days, after which time project award may be rescinded.

The City reserves the right to negotiate with the vendor that represents the best value for the City which may mean selection of a vendor that is not the lowest cost. In no event will the City be required to offer any modified terms to any other vendor prior to entering into an agreement with a proposer, and the City shall incur no liability to any proposer as a result of such negotiation or modifications. It is the intent of the City to ensure it has the flexibility it needs to arrive at a mutually acceptable agreement.

Terms and Conditions

The City reserves the right to amend the RFP to circulate various addenda, or to withdraw or cancel the RFP at any time, regardless of how much time and effort firms may have spent on their responses. Furthermore, the City may share the RFP responses with its consultants to secure expert opinion, request additional information from respondents, and require software demonstrations. Terms of the agreement are outlined in this solicitation and include the following documents, which are incorporated herein by this reference:

- RFP 10799-23
- Attachment A Key Requirements and Pricing Estimates
- Attachment B Security and Technical Requirements
- Attachment C Customer References
- Attachment D Information Privacy and Security Agreement (IPSA)
- Attachment E Consulting Services Agreement (Boilerplate)
- Attachment F Option for Renewal

Contracting Notice

Upon selection of the software solution, the City will negotiate the terms and conditions of the software vendor contract. If the City and vendor cannot come to agreement on the terms and conditions, then the City will negotiate with the next best solution.

Performance Criteria

Consultant shall perform in accordance with the terms and conditions as stated herein and in accordance with the highest standards and commercial practices. Charges of poor performance/service against the Consultant shall be documented by the City and submitted to the Consultant for corrective action. Continued poor performance shall be deemed a

breach of City requirements and shall be the cause for immediate termination of services.

Proposed Personnel

Vendor agrees to provide all professional staff necessary to perform the scope of work, including key individuals named in Vendor's proposal. These key personnel shall remain assigned for the duration of the contract, unless otherwise agreed to in writing by the City. In the event Vendor proposes to substitute any key personnel, the City will be notified in writing, and the individual(s) proposed must demonstrate similar qualifications and experience as required to successfully perform such duties. The City shall have the sole right to determine whether key personnel proposed as substitutes are qualified to work on the project. The City shall not unreasonably withhold approval of staff changes.

Insurance

Consultant must maintain insurance as outlined in the Consulting Services Agreement (Attachment E). Prior to performing any services, Consultant shall provide the City a standard ACORD Form 25 Certificate of Insurance, naming the City as Additional Insured. Failure of the City to demand such certificate or failure of the City to identify a deficiency in the insurance documentation shall not be construed as a waiver of Consultant's obligation to maintain such insurance.

ERF Retiree Return-to-Work

To comply with WAC 415-02-325 (10), the City of Redmond is required to identify and report to the Washington State Department of Retirement Systems (DRS) all individuals who are working for or plan to work for Vendor in any capacity providing services under this contract to the City of Redmond and who retired from a DRS-covered employer using the DRS 2008 Early Retirement Factors (ERF). These individuals are called "2008 ERF Retirees" and are at least 55, but younger than 65. The City is also required to report any owners of Contractor who is a 2008 ERF Retiree. Prior to contract acceptance, Contractor shall submit a City of Redmond DRS Verification Form for Contractor identifying any such 2008 ERF Retirees or certifying that none are working or will work on the project, and none are owners of Contractor.

Public Disclosure Notice

All materials provided by the respondent are subject to State of Washington and applicable County (e.g., King County) public disclosure laws, per RCW 42.56. Any information contained in the proposal that the respondent desires to claim as confidential or proprietary **must** be clearly designated, including page with particular content identified. The City assumes no obligation on behalf of the respondent to claim any exemption that is not clearly identified by the respondent as being confidential or proprietary. The City will try to respect all material identified by the respondent as being confidential or proprietary but requests that respondent be highly selective of what they mark as such. The City will make a decision predicated upon applicable laws and can choose to disclose information despite

its being marked as confidential or proprietary. Marking the entire proposal as confidential or proprietary, and therefore, exempt from disclosure will NOT be accepted or honored, and may result in disclosure of the entire proposal or disqualification of the proposal solely at the discretion of the City. Documents identified as confidential or proprietary will not be treated as such if public disclosure laws take precedence, the information is publicly available, the information is already in the City's possession, the information is obtained from third parties without restrictions on disclosure, or the information was independently developed without reference to the confidential information.

Cooperative Purchasing

The City has entered into intergovernmental (interlocal) purchasing agreements pursuant to RCW 39.34 with other Washington agencies under which either party may make purchases at the other party's accepted bid price. By submitting an offer, the respondent agrees to make the same bid terms and price, exclusive of freight, available to other Washington governmental agencies. Only those public agencies that have complied with the requirements outlined in RCW 39.34 are eligible to use this contract. Further, the public agency accepts responsibility for compliance with any additional or varying laws and regulations governing purchases by or on behalf of the public agency in question. A purchase by a public agency shall be affected by a purchase order from the public agency, directed to the Consultant or other party contracting to furnish goods or services to the City. The City of Redmond will not accept responsibility for purchase orders issued by other public agencies.

This offer of cooperative purchasing shall be extended by the Consultant to cover the City's contract duration (for any subsequent purchase orders/contracts resulting from this RFP) or 60 days post award (for one-time purchases).

Non-Collusion

By submission of this proposal, respondent and each person signing on behalf of respondent certifies, and in the case of joint proposal, each party thereto certifies as to its own organization, under penalty of perjury, that to the best of his/her knowledge and belief: (1) The prices of this proposal have been arrived at independently, without collusion, consultation, communication, or agreement with any other respondent or competitor, for the purposes of restricting competition or as to any matter relating to price. (2) Unless otherwise required by law, the prices quoted in this proposal have not been knowingly disclosed by respondent and will not be disclosed by respondent directly or indirectly to any other respondent or competitor before proposals are opened. (3) No attempt has been made or will be made by the respondent to induce any other person, partnership, or corporation to submit or not to submit a proposal on any portion of the project work. If collusion is uncovered, the City maintains the right to reject all proposals from implicated parties.

Governing Law and Venue

In the event of litigation, the submittal documents, specifications, and related matters shall be governed by and construed in accordance with the laws of the State of Washington. Venue shall be with the appropriate state or federal court located in King County.

Bid Protest

Respondents have the right to protest certain decisions in contract solicitation, selection and award processes made by the City. The City will consider protests alleging to issues related to: (1) A matter of bias, discrimination, or conflict of interest, (2) Non-compliance with procedures described in the solicitation or City policy.

All protests shall be in writing and clearly state that the respondent is submitting a formal protest. Protests must be emailed to the RFP content contact listed below. Bid Protests will not be accepted later than two (2) business days after respondents are notified of award details. The City's Technical Contact and RFP Content Contact will review any protest and respond to protestor within ten (10) business days. The City may request additional time if needed. Protestor and the other respondents will be notified in writing if protest results in a change to award details and/or protest results in a new solicitation process.

Americans with Disabilities Act (ADA) Information

The City of Redmond in accordance with the Americans with Disabilities Act of 1990 and Section 504 of the Rehabilitation Act of 1973 will make every reasonable effort to provide equal opportunity to submit qualifications in response to this request. Visit <http://redmond.gov/ADA> for more information. This material can be made available in an alternate format by contacting the Customer Service Center at info@redmond.gov or 425-556-2900, option 7.

Title VI Statement

The City of Redmond in accordance with Title VI of the Civil Rights Act of 1964, 78 Stat. 252, 42 U.S.C. 2000d to 2000d-4 and Title 49, Code of Federal Regulations, Department of Transportation, subtitle A, Office of the Secretary, Part 21, nondiscrimination in federally assisted programs of the Department of Transportation issued pursuant to such Act, hereby notifies all respondents that it will affirmatively ensure that in any contract entered into pursuant to this advertisement, disadvantaged business enterprises as defined at 49 CFR Part 26 will be afforded full opportunity to submit qualifications in response to this invitation and will not be discriminated against on the grounds of race, color, national origin, or sex in consideration for an award. Visit <http://redmond.gov/TitleVI> for more information.

Questions/Inquiries

Please direct any questions concerning this RFP or the City’s requirements to the City agent(s) listed below. No other City official or employee is empowered to speak for the City with respect to this request. Information obtained from any other source shall not be binding and may disqualify your response.

RFP Content:

Audrey Stenerson
Sr. Purchasing Agent
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Technical Contact:

Maria O’Neill
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