

City of Coquitlam

Request for Proposals

RFP No. 24-034

Kofax MarkView 10.x Upgrade

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## [PROPOSAL SUBMISSION FORM](#)

### KEY DATES

<b>RFP Issue Date</b>	<b>Wednesday, March 13, 2024</b>
<b>Deadline for Questions</b>	<b>2:00 PM (local time) Thursday, April 4, 2024</b>
<b>Deadline for Issuing Addenda</b>	<b>Friday, April 5, 2024</b>
<b>Submission Deadline</b>	<b>2:00 PM (local time) Tuesday, April 9, 2024</b>

### SUMMARY OF KEY INFORMATION

<b>RFP Reference</b>	<b>RFP No. 24-034</b> <b>Kofax MarkView 10.x Upgrade</b>
<b>Overview of the Opportunity</b>	Provide Consulting services assistance to City staff to upgrade Kofax MarkView from the currently installed 10.1 version to the latest MarkView version at the time of the project initiation.
<b>Instructions for Proposal Submission</b>	<p>Proposal submissions are to be returned in Microsoft Word and any other supporting documents to be consolidated into one PDF file and uploaded through QFile, the City's file transfer service accessed at website: <a href="http://qfile.coquitlam.ca/bid">qfile.coquitlam.ca/bid</a></p> <ol style="list-style-type: none"> <li><b>In the "Subject Field" enter:</b> RFP Number and Name</li> <li><b>Add files in .pdf format and Send</b> (Ensure your web browser remains open until you receive 2 emails from QFile to confirm receipt.)</li> </ol> <p>Phone 604-927-3037 should assistance be required. The City reserves the right to accept Proposals received after the Closing Date and Time.</p>
<b>Obtaining RFP Documents</b>	<p>RFP Documents are available for download from the City of Coquitlam's website: <a href="https://www.coquitlam.ca/Bid-Opportunities">https://www.coquitlam.ca/Bid-Opportunities</a></p> <p>Printing of RFP documents is the sole responsibility of the Proponents.</p>
<b>Questions</b>	Send questions to: <a href="mailto:bid@coquitlam.ca">bid@coquitlam.ca</a> referencing the RFP name and number.
<b>Instructions to Proponents</b>	The guidelines for participation that will apply to this RFP are posted on the City's website: <a href="#">Instructions to Proponents</a>
<b>Withdrawal of Submission</b>	Proposals may be withdrawn by written notice only, made by an authorized representative of the Proponent sent to email: <a href="mailto:bid@coquitlam.ca">bid@coquitlam.ca</a> prior to the Closing Date and Time.
<b>Terms and Conditions of Contract</b>	The City's <a href="#">Standard Terms and Conditions - Consulting and Professional Services</a> are posted on the City's website and will apply to any Contract awarded resulting from this RFP.

## DEFINITIONS

**“Agreement” “Contract”** means the contract for services or City Purchase Order that will be issued to formalize with the successful Proponent through the negotiation process with the City incorporating the information contained in this RFP, the City’s [Standard Terms and Conditions - Consulting and Professional Services](#) published on the City’s website, the accepted Proposal, addenda and any subsequent clarifications, correspondence, the totality of which will constitute the Contract.

**“City” “Owner”** means City of Coquitlam;

**“Contractor”** means the person(s) firm(s) or corporation(s) appointed by the City to carry out all duties, obligations, work and services described in the Request for Proposal and all associated documentation, which may also include mutually agreed revisions subsequent to submission of a Proposal. Both “Contractor” and “Proponent” are complementary in terms of duties, obligations and responsibilities contemplated at the Request for Proposals stage, through evaluation process, execution and performance of the services and Works.

**“Price”** means the amount that will be paid by the City to the Contractor for delivery and acceptance of goods and Services;

**“Project Manager”** means the City staff member appointed to coordinate the Work;

**“Proponent”** means responder to this Request for Proposals;

**“Proposal”** means the submission by the Proponent;

**“Request for Proposals” “RFP”** shall mean and include the complete set of documents, specifications and addenda incorporated herein, and included in this Request for Proposals;

**“Services” “Work” “Works”** means and includes the provision by the successful Proponent of all services, duties, and expectations as further described in this RFP. This will also mean the whole of the Work, tools, materials, labour, equipment, travel, and all that is required to be done, furnished and performed by the Contractor;

**“Shall” “Must” “Will” “Mandatory”** means a requirement that must be met;

**“Supply” “Provide”** shall mean supply and pay for and provide and pay for.

## **1. INSTRUCTIONS TO PROPONENTS**

### **1.1. Acknowledgement**

The City acknowledges with gratitude and respect that the name Coquitlam was derived from the hə́hǵəmiḥə́m word kʷikʷə́łəm (kwee-kwuh-tlum) meaning “Red Fish Up the River”. The City is honoured to be located on the kʷikʷə́łəm (Kwikwetlem) traditional and ancestral lands, including those parts that were historically shared with the s̓q̓əciyaʔ təməxʷ (Katzie), and other Coast Salish Peoples.

### **1.2. Purpose**

Provide Consulting services assistance to City staff to upgrade Kofax MarkView from the currently installed 10.1 version to the latest MarkView version at the time of the project initiation.

### **1.3. Proposal Submission**

Proponents should complete and submit the information requested in this RFP document on the Proposal Submission Form or in a format that has been approved and is acceptable to the City.

### **1.4. Instructions to Proponents**

Proponents are advised that the rules for participation that will apply to this RFP are located: [Instructions to Proponents](#).

By submission of a Proposal in response to this RFP, the Proponent agrees and accepts the rules by which the bid process will be conducted.

### **1.5. Prices**

Prices shall be all-inclusive and stated in (Canadian Funds). Prices shall remain FIRM for the completion of the Services.

Prices shall include the provision of all tools, materials, equipment, labour, transportation, fuel, supervision, management, overhead, materials, traffic control, services, all necessary packing and crating (where applicable), Canadian Customs import and export duties, freight, handling, insurance, all other associated or related charges, foreign, federal, provincial and municipal taxes, bonding costs, all licences, permits, inspections and all other requirements necessary for the commencement, performance and completion of Services as described.

Taxes are to be shown separately at time of invoicing.

The lowest price of any Proposal will not necessarily be accepted but will be analyzed to determine best overall value.

### **1.6. Requested Departures**

The Proponent acknowledges that the departures requested in the Proposal Submission Form will not form part of the Contract unless and until the City specifically

consents in writing to any of them. The City may not consider any departures not stated in the Proponent's Proposal Submission.

### 1.7. Evaluation Criteria

Evaluation Criteria of each proposal will be determined in accordance with the following:

<b>Proposal Evaluation Summary</b>	<b>Maximum Points to be Awarded</b>
Corporate	30
Sustainable Benefits and Social Responsibility	10
Technical	30
Financial	30
<b>Total</b>	<b>100</b>

The criteria for evaluation of the Proposals may include, but is not limited to:

#### **Corporate**

- Project Understanding - Comprehensive understanding of the project objectives, outcomes and vision; major issues and opportunities presented in the Proposal;
- Project Team - description and role of Consultant team members and any sub-Consultants; Experience and Qualifications of team members;
- Corporate Experience and References - provide examples of similar successful projects, project dates, client names and contact information, description of team members role in each project;
- Value Added Benefits to the City - Describe your competitive advantage, value added services and benefits that would be provided to the City.

#### **Sustainable Benefits and Social Responsibility**

- Sustainable benefits
- Reconciliation
- Social Responsibility

#### **Technical**

- Proposed methodology, work plan and approach, including breakdown of tasks necessary to complete the project;
- Availability and time schedule;

#### **Financial**

- Price Schedule - Fee matrix with hourly rates and charges by level of effort (hours) associated to task and total lump sum fee including disbursements (exclude GST);

These criteria will be used to determine best overall value to the City. Proposals will be compared to select one or more that are most advantageous.

And, upon selection of one or more lead Proponent(s):

- References may be contacted
- Interviews may be conducted

The City reserves the right to check references on other projects even if they are not specifically listed. Information obtained from references will be confidential and will not be disclosed to any Proponents.

These criteria will be used to determine best overall value to the City as well as any other criteria that may become evident during the evaluation process.

The City may, at its discretion, request clarification or additional information from a Proponent with respect to any Proposal and the City may make such requests to only selected Proponents. The City may consider such clarifications or additional information in evaluating a Proposal.

Incomplete Proposals or Proposals submitted on forms other than the Proposal Form may be rejected.

Proponents agree the City may disclose names of Proponents and total award amount, however, unevaluated results, unit prices, rates or scores will not be provided to any Proponents.

The City reserves the right to reject without further consideration any Proposal which in its opinion does not meet the criteria it considers essential for the Work outlined in this RFP.

Where only one Proposal is received, the City may reject such and re-issue the RFP on a selected basis.

#### 1.8. Eligibility

For eligibility, and as a condition of award, the successful Proponent would be required to meet or provide the equivalent:

- a) Commercial General Liability (CGL) insurance \$5M coverage provided on the [City's Insurance Form - Consultant](#)
- b) Accept the City's standard Terms and Conditions posted on the City's website: [Standard Terms and Conditions - Consulting and Professional Services \(PDF\)](#)
- c) A City of Coquitlam or Tri Cities Intermunicipal [Business License](#)

These items are not required as part of this Proposal Submission but will be required prior to entering into an agreement with the City for Services.

## **2. GENERAL CONDITIONS OF CONTRACT**

### **2.1. Terms and Conditions of Contract**

The City's [Standard Terms and Conditions - Purchase of Goods and Services](#), as published on the City's website, the Conditions listed in this RFP, along with the accepted Proposal, addenda and any subsequent clarifications, correspondence, the totality of which will constitute the Contract.

## **3. SCOPE OF SERVICES**

### **3.1. Scope**

The City requests Consulting support to aid City personnel in the upgrade of Kofax MarkView, moving from its current 10.1 version to either version 10.4 or the most recent MarkView iteration at the project's initiation.

The City currently uses Oracle E-Business Suite (EBS) Financials version 12.2.11 with Oracle Enterprise Database 19C. The Consultant will provide services to reintegrate the upgraded Kofax MarkView environment with the current Oracle EBS 12.2.1 version.

The selected proponent will also provide thorough support for upgrades of Kofax Capture, Kofax Transformation Module (KTM), and Kofax Import Connector (KIC) to versions that are compatible with the selected Kofax MarkView version.

Additionally, the services will include upgrading and reintegrating or replacement with standard functionality of 16 customizations:

1. Custom Hierarchy Integration
2. Distribution coding error message
3. Release Number field set to always valid
4. Default Currency change to 'CDN'
5. Disable PO Lines Extraction
6. Changing Return to Supplier Message
7. PO Invoice Process
8. Configure MarkView SSI for Expense Invoices
9. Automatic Invoice Numbering in SSI Header
10. Add 'Contact' field for PO Invoices within KTM Validation
11. Additional Routing for AP in the 'PO Invoice Entry' queue
12. Active Directory Authentication
13. Display SSI Submitter in MarkView Viewer
14. Restrict DFF LOV
15. Generate LOV For DFF
16. KTM – Hide Receipts Section for PO



The precise Scope of Work will be established through negotiations with the shortlisted proponents, wherein a collaborative determination will be made regarding the components to be undertaken by City staff versus those assigned to Consultant.

### 3.2. Project Organization and Management

The Consultant will work with staff from the City, including regular in-person and/or virtual update meetings. It is intended that the Consultant will work collaboratively with the Project Lead and other City staff, as required, throughout the process.

The Consultant will be responsible for recording all meeting minutes, including significant proceedings and decisions, identifying 'action by' parties, and will reproduce and distribute copies of minutes within two (2) working days after each meeting. The Consultant will transmit the meeting minutes to meeting participants including those who were not in attendance.

The Consultant will lead and otherwise be responsible for all elements of the Services, including reporting at key milestones, timely communications with the City's Project Lead on emerging project issues, and maintaining complete documentation (i.e. minutes, presentations) from internal and external meetings.

The Consultant lead must receive written approval from the Project Lead for any task or personnel reassignments on the Consultant team.



City of Coquitlam

## PROPOSAL SUBMISSION FORM

RFP No. 24-034

### Kofax MarkView 10.x Upgrade

Proposals will be received as per date and time in [Key Dates Section](#)

#### **INSTRUCTIONS FOR PROPOSAL SUBMISSION**

Proposal submissions are to be returned in Microsoft Word and any other supporting documents to be consolidated into one PDF file and uploaded through QFile, the City's file transfer service accessed at website: [qfile.coquitlam.ca/bid](http://qfile.coquitlam.ca/bid)

**1. In the "Subject Field" enter:** RFP Number and Name

**2. Add files in .pdf format and "Send"**

(Ensure your web browser remains open until you receive 2 emails from QFile to confirm upload is complete.)

Proponents are responsible to allow ample time to complete the Proposal Submission process. If assistance is required phone 604-927-3037.

<b>Legal Name of Proponent</b>	
<b>Contact Person and Title</b>	
<b>Business Address</b>	
<b>Telephone</b>	
<b>Email Address</b>	

## 1. DEPARTURES AND AWARD

**a) CONTRACT** - I/We have reviewed the City's [Standard Terms and Conditions - Purchase of Goods and Services](#) and would be prepared to enter into an agreement that incorporates the City's Standard Terms and Conditions, amended by the following departures (list, if any):

Section	Requested Departure(s) / Alternative(s)

**b) SERVICES** - I/We have reviewed the Scope of Services as described in this RFP and are prepared to meet those requirements, amended by the following departures and additions (list, if any):

Requirements – Requested Departure(s) / Alternate(s) / Addition(s)

**c) AWARD** - For eligibility of award, the City requires the successful Proponent to complete and have the following in place before providing the Goods and Services.

**Section 1c items are not required as part of this Proposal but may be required prior to entering into an agreement with the City.**

i. <b>Insurance</b> – Provide Insurance coverage as per the <a href="#">City's Standard Insurance Form</a>	
ii. <b>Vendor Info</b> - Complete and return the City's Vendor Profile and Electronic Funds Transfer Application	
iii. <b>Business License</b> - A City of Coquitlam or Tri Cities Intermunicipal <a href="#">Business License</a>	

**As of the date of this Proposal, we advise that we have the ability to meet all of the above requirements except as follows (list, if any):**

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## 2. CORPORATE

<b>a) CAPABILITIES, CAPACITY AND RESOURCES</b> - Proponents to provide information on the following (use the spaces provided and/or attach additional pages, if necessary):
i. Structure of the Proponent, background, how many years they have been in business and organizational history (e.g. mission, vision, corporate directions, years in business, etc.):
ii. Proponent is to state relevant experience and qualifications as to the Services requested in the RFP:
iii. Proponent is to state any value added benefits and activities they can provide in delivering the Services. Provide details:
iv. Proponent is describe their capabilities, resources and capacities, as relevant to the Services requested in the RFP: This includes their capacity to take on this project in regards to other work the Proponent may have ongoing:

<b>b) REFERENCES</b> – Proponent shall be competent and capable of performing the Services requested and successfully delivered service contracts of similar size, scope and complexity. The City reserves the right to contact any person(s), agency(ies) or firm(s) not listed as part of an independent review (use the spaces provided and/or attach additional pages, if necessary):	
Reference No. 1	
Description of Contract	
Size and Scope	
Work Performed	
Start Date	
End Date	
Contract Value	
Project completed on budget	
Project completed on schedule	
Reference Information	Company
	Name:

	Phone Number:
	Email Address:

Reference No. 2	
Description of Contract	
Size and Scope	
Work Performed	
Start Date	
End Date	
Contract Value	
Project completed on budget	
Project completed on schedule	
Reference Information	Company
	Name:
	Phone Number:
	Email Address:

Reference No. 3	
Description of Contract	
Size and Scope	
Work Performed	
Start Date	
End Date	
Contract Value	
Project completed on budget	
Project completed on schedule	
Reference Information	Company
	Name:
	Phone Number:
	Email Address:

**c) KEY PERSONNEL** – Proponent proposes the following key personnel for the Services stated in the RFP. No changes, additions or deletions are to be made to these Key Personnel without the City's written approval. (use the spaces provided and/or attach additional pages, if necessary)

LINE ITEM	NAME	TITLE/POSITION	EXPERIENCE AND QUALIFICATIONS	YEARS WITH YOUR ORGANIZATION
i.				
ii.				
iii.				
iv.				

### 3. **SUSTAINABLE BENEFITS AND SOCIAL RESPONSIBILITY**

I. Describe all initiatives, policies, programs and product choices that illustrate your firm's efforts towards sustainable practices and environment responsibility in providing the services that would benefit the City

II. What policies does your organization have for hiring apprentices, indigenous peoples, recent immigrants, veterans, young people, women, people with disabilities and any other groups:

III. What policies does your organization have for the procurement of goods and services from local small and medium sized business or social enterprises or Indigenous owned businesses:

IV. What policies does your organization have to support reconciliation with indigenous peoples:

**4. TECHNICAL**

**a) APPROACH and METHODOLOGY**

Summarize the key features of your Proposal and the Technical Approach to be used. Provide a brief description the various components required for successful completion of the Work.

**I. Delivery, Set-Up and Execution** - Proposals should address the plan for the delivery, set up and execution of the Work.

**II. Quality Assurance** - Provide the measures the Proponent will use to maintain quality control for the Services being performed.

**III. Risk Factors** - Describe the risk factors anticipated and how the Proponent intends to mitigate these.

## 5. FINANCIAL

**a) PRICE** - Prices proposed are to be all inclusive; therefore, include all labour, material, tools, equipment, transportation, fuel, supervision, disposal fees, permit fees and any other items required for provision of the services (exclude GST):

ITEM	SCOPE OF WORK	Unit of Measure	PRICE (exclude GST)
i.	Project Initiation and Planning	Each	\$
ii.	Kofax MarkView 10.x Review, Upgrade and Oracle EBS Reintegration	Each	\$
iii.	Kofax Capture, KTM and KIC Review and Upgrades	Each	\$
iv.	Customizations Review and Reintegration	Each	\$
v.	Production Upgrade Go-Live Support	Each	\$
vi.	Post Go-Live Support	Each	\$
vii.	Project Management	Each	\$
viii.	Other not Listed:		\$
ix.	Other not Listed:		\$
<b>Total</b>			<b>\$</b>



**Attention Purchasing Manager:**

6. **I/We, the undersigned duly authorized representative of the Proponent**, having received and carefully reviewed all of the Proposal documents, including the RFP and any issued addenda posted on the City's website [www.coquitlam.ca/Bid-Opportunities](http://www.coquitlam.ca/Bid-Opportunities), and having full knowledge of the Site, and having fully informed ourselves as to the intent, difficulties, facilities and local conditions connected to performing the Services; submit this Proposal in response to the RFP.
7. **I/We** agree to the rules of participation outlined in the [Instructions to Proponents](#) and should our Proposal be selected, agree to the City's [Standard Terms and Conditions - Purchase of Goods and Services](#) and will accept the City's Contract as defined within this RFP document.
8. **I/We acknowledge** receipt of the following Addenda related to this Request for Proposals and have incorporated the information received in preparing this Proposal.

Addendum No.	Date Issued

**This Proposal** is submitted this \_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

**I/We have the authority to sign on behalf of the Proponent and have duly read all documents.**

<b>Name of Proponent</b>	
<b>Signature(s) of Authorized Signatory(ies)</b>	1.
	2.
<b>Print Name(s) and Position(s) of Authorized Signatory(ies)</b>	1.
	2.