

City of Coquitlam

Request for Expressions of Interest
RFEI No. 17-03-04

Contract Management Software

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[ATTACHMENT 1 – CURRENT TECHNOLOGY](#)

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DEFINITIONS

In this RFEI, the following terms will have the meaning set out below:

“City” means the City of Coquitlam.

“Consultant” means the firm that the City selects to implement and provide on-going support for the Contract Management Software System.

“Contract” means a formal written contract between the City and a firm selected to undertake the Services.

“Contract Management Software System” means the software-based system for managing contract documents as described in Section 1.5 of this RFEI.

“Preferred Respondent” means a proponent selected by the evaluation team to participate in a subsequent RFP process or enter into negotiations for a Contract.

“Proponent” means an entity that submits a subsequent proposal.

“Respondent” means an entity that submits a response to this RFEI.

“RFEI” means this Request for Expression of Interest.

“Services” means and includes anything and everything required to be done by the successful Proponent for the fulfillment and completion of the Contract as described in this RFEI.

“Submission” means a response submitted for evaluation in response to this RFEI.

1. REQUEST FOR EXPRESSIONS OF INTEREST

1.1 Request

The City of Coquitlam (City) Requests Expressions of Interest (RFEI) from professional, qualified and experienced firms to provide the **Contract Management Software System**.

1.2 Obtaining RFEI Documents

RFEI Documents are available for downloading from the City of Coquitlam's website:
www.coquitlam.ca/BidOpportunities

Printing of RFEI documents is the sole responsibility of the Respondents.

1.3 Budget

Budget information will not be provided.

1.4 Timelines

The City is looking to implement a corporate-wide Contract Management Software System in 2018.

1.5 Project Background and Business Needs

The City requires a centralized or corporate-wide contract management system. Most departments currently utilize spreadsheets or other similar means to track and record the contracts and related documents for which they are responsible. As the City continues to grow and the number and complexity of contracts increases, there is a need for a consistent and more sophisticated approach to managing the contract lifecycle. The City is therefore exploring available Contract Management Software solutions as a corporate-wide business improvement initiative.

The City is looking to implement a software system which presents effective contract lifecycle management abilities which are functional for use by multiple departments and which facilitate an organized, structured and collaborative process. It is critical that the software provide auto-notifications which alert users to time-specific events like renewal and expiry dates.

The City also requires that the software provide for the secure and confidential storage of contracts and information about the stored contracts. To achieve this, the software must contain access restrictions to classify City department, roles, and security level assigned. System capabilities must exist to classify the parties involved, the contract signatory, and designate the appropriate levels of authority.

The Contract Management Software System will also need to integrate with existing corporate systems, including the City's OpenText eDOCS Corporate Electronic Document Management System (CEDMS) and Microsoft Office Systems, including Outlook.

In summary, the City's business needs require a Contract Management Software System that:

- Manages and tracks the workflow and lifecycle of contracts corporate-wide;
- Provides secure, restricted storage and indexing of contracts to ensure the protection of confidential information;
- Provides proficient search capabilities to allow contracts to be easily located;
- Delivers system compatibility with City software; and
- Provides auto-notification alerts in advance of key dates and when contracts are approaching expiration.

1.6 System Requirements

The Contract Management Software System should provide the following high-level features:

- Meet the business needs of the City as described in **Section 1.5**
- Hosted or Software-as-a-Service (SaaS) models will be considered under the following additional criteria:
 - Must comply with British Columbia *Freedom of Information and Protection of Privacy Act* (FOIPPA) requirements. Refer to <https://www.oipc.bc.ca> for more information.

1.7 Scope of Services

The successful Respondent ("Consultant") would facilitate the installation of software, training and support for staff during installation and throughout all future software updates (the "Services").

The scope of services for the Contract Management Software System implementation includes, but is not limited to:

- Initial software license for either a City-hosted or SaaS solution;
- Professional services for design, implementation, configuration and project management (if applicable) working in conjunction with the City's technical and functional teams;
- End-user and administrator training, including training materials and documentation;
- On-going software support, maintenance and/or subscription costs for a specified time period;

- Integration with the City’s existing systems, such as OpenText eDOCS Corporate Electronic Document Management System (CEDMS) and Microsoft Office Systems, including Outlook Express.

It is expected that Respondents will submit detailed information regarding how they would meet the City’s business needs, as outlined in **Section 1.5**.

2. INSTRUCTIONS TO RESPONDENTS

2.1 RFEI Schedule

The following are the estimated schedule dates for the stages of this RFEI:

RFEI Closing Date 2:00 pm local time, Wednesday, June 7, 2017
Evaluation and Selection of Shortlisted Respondents July/August
Demonstrations September

The proposed schedule is an estimated timeline and may change at the discretion of the City.

2.2 Closing Date and Time

Submissions will be received on or before **2:00 pm** local time:

Wednesday, June 7, 2017

2.3 Instructions for Submission

Submissions are to be consolidated into one (1) .pdf file and uploaded electronically through QFile, the City’s file transfer service accessed at qfile.coquitlam.ca/bid

1. **In the “Subject Field” enter:** RFEI 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.)

Submissions shall be deemed to be successfully received when displayed as new email in the in-box of the City email address. The City will not be liable for any delay for any reason including technological delays, or issues by either party’s network or email program, and the City will not be liable for any damages associated with Submissions not received.

The City at their sole discretion reserves the right to accept Submissions that are received after the Closing date and time but is under no obligation to evaluate.

Submissions will not be opened in public.

Submissions may be withdrawn upon request by an authorized representative of the Respondent sent to email: bid@coquitlam.ca prior to the time set as closing time for receiving Submissions.

Respondents are required to allow ample time for completion of the Submission process.

Should assistance be required Ph: 604-927-3060.

2.4 Enquiries

All enquiries regarding this RFEI should be submitted in writing 3 business days prior to the closing date, referencing the RFEI number and name sent to email: bid@coquitlam.ca

The City shall determine, at its sole discretion, whether the query requires response, and such responses will be made available to all Respondents by issue of addenda posted on the City's website that will be incorporated into and become part of the RFEI.

No oral conversation will affect or modify the terms of this RFEI or may be relied upon by a Respondent.

Respondents should acknowledge receipt of addenda in their Submission.

2.5 Addenda

Respondents are required to check the City's website for any updated information and addenda issued before the closing date at the following website address:
www.coquitlam.ca/BidOpportunities

Upon submitting a response to this RFEI, Respondents are deemed to have received all addenda posted on the City website and deemed to have considered the information for inclusion in their Submission.

Should there be any discrepancy in the RFEI documentation provided, the City's original file copy shall prevail.

2.6 Freedom of Information and Protection of Privacy Act

Information received by the City will be held in confidence and will become the property of the City. The City is, however, bound by the provisions of the *Freedom of Information and Protection of Privacy Act*, and all parties are advised that Submissions will be treated as public documents and their contents may be disclosed, pursuant to the Act.

Respondents agree that by submitting a response to this RFEI, the City may disclose the name of their company.

2.7 Acceptance of Submissions

The City reserves the right to reject any or all Submissions or to accept any Submission received in response to this RFEI, should the City judge it be in the best interests of the City to do so. The City reserves the right to waive any irregularities in any Submission. The City is under no obligation to select a Consultant, or to proceed to negotiations for a Contract, or to award any Contract, and the City reserves the complete right to at any time reject all Submissions, and to terminate this RFEI process. If the City decides to terminate this RFEI process, it may at any time invite further Submissions or enter into any discussion or negotiations with any party for the provision of Services.

The City shall not be obligated in any manner to any Respondent whatsoever until a written agreement has been duly executed, and a budget approved.

2.8 Respondent's Expenses

Respondents are solely responsible for their own expenses in preparing Submissions, and for any meetings, negotiations or discussions with the City or its representatives and Consultants, relating to, or arising from this RFEI.

2.9 No Claim

The City and its representatives, agents, consultants and advisors will not be liable to any Respondent for any claims, whether for costs, expenses, losses or damages, or loss of anticipated profits, or for any other matter whatsoever, incurred by the Respondent as a result of or related to the RFEI, the preparation of a Submission, the evaluation of Submissions, the acceptance or rejection of any compliant or non-compliant Submission, breach of any obligations arising under the RFEI, negotiations for a Contract or the cancellation, suspension or termination of the RFEI, and by submitting a response to this RFEI, each Respondent will be conclusively deemed to waive and release the City and its employees, contractors, consultants and agents, from and against any and all such claims.

By submitting a response to this RFEI, each Respondent shall be deemed to have agreed that it has no claim.

2.10 Conflict of Interest

Respondents shall disclose in their Submission any actual or potential conflicts of interest and existing business relationships it may have with the City, its elected or appointed officials or employees.

2.11 Solicitation of Council Members and Staff

Respondents will not contact any member of the City Council or staff with respect to this RFEI at any time prior to the award of a contract or the termination of this RFEI other than as permitted as an enquiry identified in this RFEI. The City may reject the Submission of any Respondent that makes any such contact.

2.12 Not a Tender

This is not a tender process and is not intended to create a contractual relationship between the City and the Respondent. By issue of this RFEI document, the City intends to reserve itself to absolute and unfettered discretion to invite, consider and analyze Submissions, select Preferred Proponents(s) and negotiate with or issue a Request for Proposals to Preferred Proponent(s) or cancel this RFEI process as the City considers desirable.

2.13 No Obligation

The City reserves the right to accept or reject any or all Submissions or cancel this RFEI at any time. Award of the project would be subject to budget approval.

2.14 Extension of Offer

Respondents agree to allow other local public agencies with similar needs within British Columbia to participate in any contract that the City of Coquitlam may enter into as a result of this RFEI process.

Additional participating agencies may opt to enter into a contract with the successful Consultant for the purchase of the products and services described in this RFEI based on the terms, conditions, prices, and percentages that may be offered by the Consultant to the City of Coquitlam with possibly minor changes negotiated.

This is intended to be means of promoting cooperative purchasing efforts with the public sector, and to provide additional value to the Consultant.

3. Evaluation Criteria

The evaluation of Submissions will be undertaken on behalf of the City by an evaluation team. The evaluation team may consult with others including City staff members, third party consultants and references, as the evaluation team may in its discretion decide is required.

The evaluation team will compare and evaluate all Submissions to determine the Respondent's strength and ability to provide the Services in order to determine the Submission which is most advantageous to the City using the following criteria:

Corporate

- Recent demonstrated successful municipal (or similar type organization) experience with implementation of a Contract Management Software system of similar size, scope and complexity
- Qualified and experienced project team

Technical

- Software functionality and suitability, and integration with existing City of Coquitlam systems
- Proven implementation methodology, plan and schedule, key deliverables and success factors
- Proven training strategy
- Quality assurance, support, maintenance and upgrade plans

Financial

- Total price should include purchase cost, implementation costs, training costs, ongoing software support, maintenance and/or subscription costs for a specified time period.
- Price stated in Canadian dollars (exclude GST)

Demonstration

- Short-listed respondents will be required to provide a demonstration of their proposed Contract Management Software System
- The demonstration will be evaluated and the results will be included in the overall scoring

The evaluation team will not be limited to the criteria referred to above, and the evaluation team may consider other criteria that the team identifies as relevant during the evaluation process. All criteria considered will be applied evenly and fairly to all Submissions.

The evaluation team may, at its discretion, request clarification or additional information from a Respondent with respect to its Submission, and the evaluation team may make such requests to only selected Respondents. The evaluation team may consider such clarifications or additional information in evaluating a Proposal.

The Submission form and the resumes provide Respondents with the opportunity to demonstrate their strength in the above criteria.

4. Selection Process

The evaluation team will review the Submissions and rank them based on the evaluation criteria outlined above. The City reserves the right to consider other criteria that may become evident during the evaluation process to obtain best value.

The City may, at its discretion, interview one or more Respondents, or request clarifications or additional information from a Respondent with respect to any Submission.

Based on the evaluation results, the City will create a short list of highest ranked companies. The City may then negotiate directly with the highest ranked Respondent or request proposals from one or more of the selected Respondents to provide the Services.

The evaluation will be confidential and no prices, totals, weights or scores will be released to any of the Respondents.

5. Negotiation

The City reserves the right to accept or reject any or all submissions, cancel this RFEI or, prior to award, to negotiate changes to the scope of Services, including pricing with one or more Respondents, proposing the “best value” without having any duty to advise any other Respondent or to allow them to vary their submission as a result of changes.

The City may enter into a changed or different scope of Services with the Respondent proposing “best value”, without liability to Respondents that are not awarded the Contract.

Award of contract would be subject to budget approval.

6. Request for Debrief

Upon request, unsuccessful companies may request a debrief with City staff regarding their submission sent to email: bid@coquitlam.ca

The City will not provide information regarding other company’s submissions.

ATTACHMENT 1 CURRENT TECHNOLOGY

Desktop PCs	Windows 7 Professional
Servers	Windows 2012 R2, VMWare vSphere 5.5
Database	Oracle 12.1, Oracle VM
LDAP	Microsoft Active Directory 2008 R2
Relevant Applications	OpenText eDOCS DM 5.3.1 SP3 (upgrading to DM 10) Microsoft Office 2010 (Word, Excel, etc.) Adobe Acrobat X Adobe Reader XI Bluebeam Revu 2016.5



City of Coquitlam
REQUEST FOR EXPRESSIONS OF INTEREST
RFEI No. 17-03-04

Contract Management Software

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Wednesday, June 7, 2017
("Closing date and time")

INSTRUCTIONS FOR SUBMISSION

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- 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.)

Respondents are responsible to allow ample time to complete the Submission process. If assistance is required, phone 604-927-3060.

SUBMISSION FORM

Complete and return this section

Submitted By: _____
(Company Name)

1. CORPORATE PROFILE

Provide a brief description of the current business.

Corporate		
.1	Registered Business Name	
.2	Operating Business Name	
.3	Location and address of Head Office	
.4	Number of Years in Business	
.5	Number of Employees	

2. PRICE

Price for Supply & Implementation of Software		
<p>Provide price for implementation using the following example:</p> <ul style="list-style-type: none"> • 10 named users with read/write access • 25 named users with read-only access <p>Amounts stated above are estimates provided for evaluation purposes. Prices are requested as part of this RFEI process for the City’s budget and planning purposes. Prices are to be stated in Canadian funds.</p>		
Name of Software	Description	Price
Item	Description	Price (exclude PST & GST)
2-1	Initial Software License Cost	\$
2-2	Implementation & Configuration Services (incl. travel expenses if applicable)	\$
2-3	Integration Services (incl. travel expenses if applicable)	\$
2-4	Administrator and End-User Training	\$
2-5	Software Support, Maintenance and/or Subscription for initial one (1) year term	\$
2-6	Total (exclude PST & GST)	\$
2-7	<p>Subsequent Years – Example: Years 2 through 5 – Software Upgrades, Support, Maintenance and/or Subscription – Price per year</p> <p style="text-align: center;">Year 2</p> <p style="text-align: center;">Year 3</p> <p style="text-align: center;">Year 4</p> <p style="text-align: center;">Year 5</p>	<p>\$</p> <p>\$</p> <p>\$</p> <p>\$</p>
2-8	Price for adding additional licences in future years (specify licence metric)	\$
2-9	Hourly rate for additional professional consulting services	\$
2-10	Advise if there would be any additional costs associated with the software or services (describe below)	\$
2-11	Confirm price will be held until:	

3. SOFTWARE AND SUPPORT

Item	Description	Provide Details
3-1	Software Name and Version	
3-2	Provide Technical details concerning software functionality, how it will meet the City’s business needs as outlined in Section 1.5 , and how it would integrate with the City’s current systems (attach specifications)	
3-3	How is the software licensed? (Named-user, concurrent-user, server-based, etc.)	
3-4	Training – provide information regarding end-user and administrator training, including training materials and documentation;	
3-5	How do we access support? (email, phone, web)	
3-6	What are the hours of availability and response time for support?	
3-7	What support services are chargeable during the support period?	
3-8	What support services are non-chargeable during the support period?	
3-9	Describe the process and frequency for providing upgrades and patches for the software.	
3-10	How are annual support, maintenance and/or subscription price increases determined? (Locked in at purchase, capped at a percentage, tied to an index such as CPI, etc.)	
3-11	Confirm your company will be able to provide a Privacy Impact Assessment upon request by the City	

4. SOFTWARE-AS-A-SERVICE (SAAS) MODEL

If a hosted or SaaS model is being proposed, please provide the following information.

Item	Description	Provide Details
4-1	Where is the solution and platform hosted (e.g. by proponent or 3rd party)? Note: solutions hosted outside Canada are subject to additional privacy regulations than Canada based solutions.	
4-2	How is the data protected?	
4-3	How is the data backed up?	
4-4	What controls are in place for intrusion detection, perimeter security, physical security and security patching?	
4-5	Who has access to the data?	
4-6	What policies are in place to detect, prevent and mitigate identity theft with respect to storing personal information?	
4-7	Have there been any instances of identity theft in the last two years? Please describe.	
4-8	How are security incidents and breaches reported internally and to clients?	
4-9	What is your high-level disaster recovery plan and how is client information protected in such an event?	
4-10	Who owns the data collected during and after the services have been terminated, or if the firm goes out of business?	
4-11	How will the City get its data back in the event the Consultant goes out of business?	
4-12	How are routine reviews of your security and disaster recovery environments undertaken?	

4. SOFTWARE-AS-A-SERVICE (SAAS) MODEL (cont'd)

Item	Description	Provide Details
4-13	How is third-party verification of your security and disaster recovery environments undertaken?	
4-14	What is your Service Level Agreement (SLA) and associated terms, including performance and latency targets? (Please attach) If applicable, provide information on recommended infrastructure to reach these targets.	

5. KEY PERSONNEL

List key personnel and any sub-consultants who would be involved in the project.

Name	Role and Responsibility	Years with Firm	Qualifications and Experience

6. TIMELINES

Include projected schedules and timeline required to implement the software.

7. METHODOLOGY

Outline the methodology for a successful software implementation including the integration to the City’s current technology. Describe the key deliverables, success factors and acceptance criteria.

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8. EXAMPLES OF SUCCESSFUL PROJECTS – RECENT EXPERIENCE AND REFERENCES

Experience should include recent contracts similar in size, scope and complexity to the City of Coquitlam.

By submitting a response, Respondents authorize the City to verify information provided to confirm client satisfaction and demonstrated success. The City will not discuss or disclose information provided with any Respondent.

CLIENT	
Project Start and End Date	
Approximate Value	
Reference Contact	
Telephone / Email	

CLIENT	
Project Start and End Date	
Approximate Value	
Reference Contact	
Telephone / Email	

CLIENT	
Project Start and End Date	
Approximate Value	
Reference Contact	
Telephone / Email	

9. SUSTAINABLE BENEFITS

Briefly describe your company’s social, economic and environmental initiatives, innovations, and practices and how those would benefit the City.

10. VALUE ADDED BENEFITS

What other information is not requested here but which you think the City should consider in evaluating your company?

Provide information on what makes your company innovative, what is your competitive advantage, and what other services your company provides that would assist or be of benefit to the City:

11. CONFLICT OF INTEREST DECLARATION

Respondents shall disclose any actual or potential conflicts of interest and existing business relationships it may have with the City, its elected or appointed officials and employees:

12. ADDENDA

We acknowledge receipt of the following addenda related to this RFEI and have incorporated the information received in preparing this submission:

Addendum No.	Date Issued

13. AUTHORIZATION

We hereby submit our response to provide the services as specified in this RFEI:

Company Name:	
Address:	
Phone:	
GST Registration No.:	
Project Contact: Name and Title of Individual <i>for communication related to this RFEI</i> (please print)	
Contact Email:	
Name & Title of Authorized Signatory: (please print)	
	Signature:
Date:	

The signature above is an authorized representative that can bind the company to statements made in this Submission. For the purpose of this RFEI, electronic signatures will be accepted.