



**REGIONAL DISTRICT OF OKANAGAN-SIMILKAMEEN**

**REQUEST FOR PROPOSALS**

**for the**

**Purchase of Asset Management Software**

**RDOS-22-FIN-07**

**[April 2022]**

**REGIONAL DISTRICT OF OKANAGAN-SIMILKAMEEN**

**REQUEST FOR PROPOSALS**

**[Asset Management Software]**

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**REQUEST FOR PROPOSALS**  
**ASSET MANAGEMENT SOFTWARE PURCHASE**

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**1. INTRODUCTION**

**1.1. PURPOSE**

The Regional District of Okanagan Similkameen is requesting submission of Proposals for the supply, and support of asset management software for its staff.

The purpose of this Request for Proposal (RFP) is to solicit proposals from qualified proponents to provide professional services to supply, install and provide training for software that will maintain our tangible assets, as well as provide an efficient tool for capital planning and analysis, to be used in conjunction with our Asset Management Plan for long range planning.

**2. INSTRUCTIONS TO PROPONENTS**

**2.1. SUBMISSION OF PROPOSALS**

Proposals may be submitted by email and/or hardcopy until the Closing Time specified. It is the Proponent's sole responsibility to ensure its Proposal is received at the address or email set out above by the Closing Time.

The Proposals and their envelopes should be clearly marked with the name and address of the Proponent, the RFP program title, and be addressed to the following:

**Nathan Grant, Accountant II - Asset Management**  
**Regional District of Okanagan-Similkameen**  
**101 Martin Street**  
**Penticton, B.C. V2A 5J9**

**Email submissions are to be sent to:**

[ngrant@rdos.bc.ca](mailto:ngrant@rdos.bc.ca)

Proposals must be received on or before the **Closing Time** of:

TIME: **10:00 AM Pacific Time**

DATE: **Friday May 27, 2022**

Proposals will not be opened publicly. The Proponent bears all risk associated with delivering its Proposal by electronic submission, including but not limited to delays in transmission between the

Proponent's computer and the Regional District's mail system.

Proponents wishing to make changes to their Proposals after submission but prior to the Closing Time may do so by submitting the revisions by email or hard copy to the address above.

It also is the Proponent's sole responsibility to ensure their revisions were received, at the e-mail or address set out above, prior to the Closing Time.

## **2.2. INQUIRIES**

All inquiries related to this RFP are to be directed, in writing, to the following person. Information obtained from any other source is not official and should not be relied upon. Inquiries and responses will be recorded and may be distributed through an addendum at the Regional District's option.

Any questions regarding this RFP must be submitted at least five (5) working days prior to the Closing Date. Any questions submitted after this date may not be answered.

Nathan Grant, Accountant II – Asset Management

phone: (250) 490-4216

email: [ngrant@rdos.bc.ca](mailto:ngrant@rdos.bc.ca)

## **2.3. ACCEPTANCE OF TERMS AND CONDITIONS**

Submitting a Proposal indicates acceptance of all the terms and conditions set out in the RFP, including those that follow and that are included in all appendices and any Addenda.

A person authorized to sign on behalf of the Proponent must sign the Proposal.

## **2.4. PROPOSAL PREPARATION COSTS**

All expenses incurred by the Proponent in preparation and submission of this Proposal are to be borne by the Proponent, with the express understanding that no claims for reimbursements against the Regional District, or any of its member municipalities, will be accepted. The Regional District shall not be responsible for any costs involved in or associated with any meetings, discussion or negotiation following submission that could lead to acceptance of the Proposal and award of a contract.

## **2.5. PROPOSAL EVALUATION**

The Regional District recognizes that "Best Value" is the essential part of purchasing a product and/or service and therefore the Regional District may prefer a Proposal with a higher price, if it offers greater value and better serves the Regional District's interests, as determined by the Regional District. The Regional District, at its sole discretion, reserves the right to:

- reject any or all Proposals whether complete or not,
- reject any Proposal it considers not in its best interests,
- waive any minor irregularity or insufficiency in the Proposal submitted,
- not be liable for misunderstandings or errors in the Request for Proposals,

- issue addenda to the Request for Proposals,
- contact references provided by the Proponents,
- retain independent persons or contractors for assistance in evaluating Proposals,
- request points of clarification to assist the Regional District in evaluating Proposals,
- negotiate changes with the successful Proponent,
- award separate contracts for separate work components, and withdraw the Request for Proposals District, over a Proposal with a lower price.

## 2.6. STRUCTURE OF PROPOSAL DOCUMENT

- Title Page
- One to two-page Executive Summary of response, highlighting key features permitting for an efficient evaluation
- Body of the proposal should contain a statement of compliance for each requirement outlined in Appendix A either in table or point form. The following must be included for each requirement:

Requirement #	Description	Compliance	Comments
Full requirement # from Appendix A	Statement in own words demonstrating understanding of requirement	Comply OR Partially Comply OR Do Not Comply	Comment section to explain compliance statement

- Business registration profile
- Identification of key members of the implementation team and a statement of experience or resume demonstrating their experience with similar projects
- Three references demonstrating Proponent experience with similar projects
- The identification of Proponent's authorized agent designated to discuss and possibly negotiate elements contained within the response
- A detailed implementation timeline from start to finish including project milestones
- Appendices (if required)

## 2.7. CRITERIA FOR EVALUATION OF THE SOFTWARE

The RDOS will use the following criteria in evaluating the proposal received.

- **Price** – Pricing will be evaluated using five year total cost of ownership. Please include all necessary information to determine this cost, including but not limited to:
  - Initial capital cost, set up costs and licencing fees (# of licences included and cost for additional if applicable)
  - Reoccurring licencing and/or maintenance fees
  - Support/Helpdesk costs
  - Implementation and/or consulting fees
  - Hosting costs (if applicable)
  - If applicable, please break down the costs of different modules. For example, if the Maintenance Management or Long Term Forecasting are optional components, please provide these separately.
- **Ability to meet features** – The ability of the Software to meet the features identified within section Appendix A of the RFP
- **Software support** – Within the proposal process the vendor shall explain how their product will be supported with knowledgeable people in a timely manner.
- **Licensing flexibility** – Should the regional district wish to expand its use of the software, we advantage software in our scoring that can accommodate growth at a low cost. Changes to software licensing should be easy to change.
- **Proven Industry track record** – References and wide spread use and acceptance in the industry.
- **How Intuitive the software is to use** – The software will be used by both technical and non-technical staff. It should be easy to use and features of the program should be intuitive. Help should be easy to find. As part of the demonstration process, the RDOS will evaluate how easy the software is to use.

## 2.8. 2020 RDOS ASSET MANAGEMENT PLAN DOCUMENT

- For purposes of assisting with proposals, the RDOS Asset Management Plan can be viewed here:

[2020 RDOS Asset Management Plan](#)

## 2.9. NO CONTRACT

This RFP is not a tender and does not commit the Regional District in any way to select a preferred Proponent. By submitting a Proposal and participating in the process as outlined in this RFP, Proponents expressly agree that no contractual, tort or other legal obligation of any kind is formed under or imposed on the Regional District by this RFP or submissions prior to the completed execution of a formal written Contract.

## 2.10. NO OBLIGATION TO PROCEED

The Regional District fully intends at this time to proceed with the proposed project, however the Regional District is under no obligation to proceed to award of the Contract. The receipt by the

Regional District of any information (including any submissions, ideas, plans, drawings, models or other materials communicated or exhibited by any intended Proponent, or on its behalf) shall not impose any obligations on the Regional District.

There is no guarantee by the Regional District that the process initiated by the issuance of this RFP will continue, or that this RFP process or any RFP process will result in a Contract with the Regional District for the purchase of the equipment, service, or project.

#### **2.11. NEGOTIATION WITH PREFERRED PROPONENT**

The Proponent that submits the most advantageous Proposal may be awarded the Contract. The Regional District reserves the right to accept or reject all or parts of the Proposal, however, the Regional District is not precluded from negotiating with the preferred Proponent to modify its Proposal to best suit the needs of the Regional District.

The Regional District will enter into negotiations with a preferred Proponent to finalize any scope changes necessary to implement the project, as generally described in this RFP. If the Regional District considers that it is unlikely to settle such agreements with the preferred Proponent despite having negotiated with the preferred Proponent, the Regional District is entitled to cease negotiations with the preferred Proponent and to begin negotiations with another Proponent.

#### **2.12. ACCEPTANCE OF PROPOSAL**

Following acceptance of the Proposal, the agreement that the successful Proponent will be expected to execute with the Regional District will contain terms similar to those provided in Appendix B.

The expected attachments to the agreement will include the Request for Qualifications and the Proponent's submission, the Request for Proposal, the Proponent's Proposal submission and any mutually agreed upon modifications, changes or negotiated adjustments.

#### **2.13. LIABILITY FOR ERRORS**

While the Regional District has expended considerable efforts to ensure an accurate representation of information in this Request for Proposal, the information contained in this Request for Proposal is supplied solely as a guideline for Proponents. The information is not guaranteed or warranted to be accurate by the Regional District, nor is it comprehensive or exhaustive.

Nothing in this Request for Proposals is intended to relieve Proponents from forming their own opinions and conclusions with respect to the matters addressed in the Scope of Work

#### **2.14. PROPOSAL CONFIDENTIALITY AND PROPRIETARY INFORMATION**

All submissions become the property of the Regional District and will not be returned to the Proponent. The Regional District will consider all Proposals submitted as confidential but reserves the right to make copies of all Proposals received for its internal review and for review by its financial, accounting, legal, and technical consultants.

Proponents should be aware that the Regional District is a "public body" as defined in and subject to

the provisions of the *Freedom of Information and Protection of Privacy Act*.

If the Proponent believes any of the information requested in this RFP and provided by them is confidential, then they should identify it as such and provide a rationale as to why it should not be released under “Freedom of Information” legislation.

#### **2.15. CONFLICT OF INTEREST**

A Proponent shall disclose in its Proposal any actual or potential conflicts of interest and existing business relationships it may have with the Regional District, its elected or appointed officials or employees, any property ownership direct or indirect in the project area. The Regional District may rely on such disclosure.

#### **2.16. NO COLLUSION**

Except as otherwise specified or as arising by reason of the provision of the contract documents, no person whether natural, or body corporate, other than the Proponent has or will have any interest or share in this Proposal or in the proposed contract which may be completed in respect thereof.

There is no collusion or arrangement between the Proponent and any other actual or prospective Proponents in connection with Proposals submitted for this project and the Proponent has no knowledge of the contents of other Proposals and has made no comparison of figures or agreement or arrangement, express or implied, with any other party in connection with the making of the Proposal.

#### **2.17. Process for Selection:**

The RDOS will develop a shortlist of vendors that it believes best fits the selection criteria listed above.

References of the shortlisted vendors will be contacted by members of the RDOS selection team prior to contacting the vendors. The vendor should expect a series of clarification questions regarding their product.

The RDOS will ask the vendor to provide a live demonstration of their product via Webex or other similar web conferencing solution as is suitable to the vendor.

The RDOS selection team will select a product that they deem to be the best meets the selection criteria set above.

### 3. REQUIREMENTS AND FEATURES OF SOFTWARE

The Regional District wishes to the have the following features.

3.1. General Requirements	Yes	No
3.1.1. The core of the proposal must consist of commercial, off-the-shelf Enterprise Asset Management software. A fully custom coded solution is not acceptable; however, custom configuration of commercial off-the-shelf software is acceptable.		
3.1.2. The Software must either be hosted on premises, OR be cloud-hosted on servers located within Canada. If cloud-hosted, a guarantee must be made that Regional District data would not leave Canada for any reason.		
3.1.3. Authentication integration must support at least Active Directory, Azure Active Directory or SAML ("Security Assertion Markup Language").		



<b>3.2. Asset Management</b>	<b>Yes</b>	<b>No</b>
3.2.1. Asset tracking at the Department, Division Service and Electoral Area level		
3.2.2. Asset tracking from acquisition to disposal, including transfers between departments without affecting work order history.		
3.2.3. Asset tracking compatible with PSAB 3150 reporting requirements including retirement obligations and optional capitalization of selected components.		
3.2.4. Track asset replacement values obtained by either appraisals or statement of values.		
3.2.5. Customizable attribute fields for each asset system, grouping or type (i.e. utility attributes may vary from facility attributes)		
3.2.6. Customizable lookup fields for asset records.		
3.2.7. Unlimited parent-child relationships between assets.		
3.2.8. Built-in data models and processes to support the management of each asset system (e.g. facilities, water, fleet, networking, etc.).		
3.2.9. Define user permissions based on asset systems.		
3.2.10. Proven integration with ESRI Geographic Information System for asset records and attribution, property owner information, and civic addresses.		
3.2.11. Two-way interaction with ESRI Geographic Information System to graphically represent the asset data in a spatial context.		
3.2.12. Allow users to attach, by reference, data stored in an Electronic Document and Records Management System ("EDRMS") that may be relevant to a particular asset (e.g. PDF manuals and drawings, emails, or any other similar document that may exist).		
3.2.13. Desired integration with VADIM for financial transactions, asset registry, and employee records.		
3.2.14. Fuel consumption and vehicle/equipment kilometers imported from excel files, csv format or API Service.		

3.2.15. QR reading for asset identification.		
3.2.16. Packaged and configurable asset inspection capabilities with weighted scoring to determine an overall condition rating		
3.2.17. Ability to manage asset system data co-managed by RDOS and partner organizations		

<b>3.3. Maintenance Management</b>	<b>Yes</b>	<b>No</b>
3.3.1. The system shall provide the capability to define preventative maintenance ("PM") programs for asset types, sub-types, classes, groups, components etc. and custom PM templates, and check lists.		
3.3.2. The system should allow user to pick if a maintenance job is preventive or corrective maintenance.		
3.3.3. Create customizable work order attribute fields based on asset type.		
3.3.4. Lookup work orders by any work order attribute field.		
3.3.5. Customizable codes tables for all work order attribute fields.		
3.3.6. Create scheduled work orders based on time or usage readings.		
3.3.7. Create group work orders for capturing time associated to completing simple tasks against similar assets, with associated costs divided amongst the assets.		
3.3.8. Electronic work order approval.		
3.3.9. The system should allow the user to designate tasks to be conducted by internal resources or external vendor resources.		
3.3.10. System shall be configurable, allowing for defined statuses of work request (new, under process, closed, cancelled, on-hold etc.), as well as the addition of custom fields and templates.		
3.3.11. System should be able to allow the user to configure rules so that categories of work requests can be automatically assigned to certain staff/departments. e.g. Work requests for water systems can be automatically assigned to water supervisors or operators etc.		

3.3.12. The system should allow the user to add text comments, attachments, SOP's photos etc. for each major work order task (multiple comments or notes per work order).		
3.3.13. The system should allow users to record the remedy or actions taken to resolve the problem or complete the work order. This could be in text format or drop-down lists.		
3.3.14. The system should provide total maintenance costs by asset system or type.		
3.3.15. Project estimating for labour, equipment, material, and contracted services.		
3.3.16. Project management through resource scheduling.		
3.3.17. QR reading for work order identification and resource usage.		
3.3.18. Printed work order reports customized for the different asset systems and divisions, users.		
3.3.19. Ability to utilize failure codes to track maintenance trends.		
3.3.20. Batch print/close of work orders.		

<b>3.4. Reporting &amp; Analysis</b>	<b>Yes</b>	<b>No</b>
3.4.1. Annual report for all TCA showing depreciation, additions, disposals, betterments and Work -in-progress at historical costs (as a part of PSAB 3150 requirements).		
3.4.2. Output relevant data (charts, graphs, tables) to Sustainable Service Delivery Plans and State of Infrastructure reporting.		
3.4.3. Evaluation of overall existing asset risk score. This will include a computation tool to quantify risk scores for assets as this will drive the RDOS for a) Investment Planning b) Maintenance Planning c) Emergency Response d) Insurance purpose.		
3.4.4. Analysis of current condition and maintenance history to predict future performance and costs.		

3.4.5.	Analysis of lifecycle costing, including asset reporting on work order maintenance type and activity of the primary asset and all associated assets.		
3.4.6.	Report on established levels of service statements and performance measures in order to benchmark current service against industry best practice.		
3.4.7.	Built-in risk model that can determine the likelihood and consequence of asset failure based on customizable factors and weighting, including climate change impacts.		
3.4.8.	Identify and prioritize feasible asset renewal plans.		
3.4.9.	Easy access to the data for report and query generation without the need for vendor support.		
3.4.10.	Incorporate externally referenced data (e.g. digital photographs) into asset condition reports or any other similar generated system output.		
3.4.11.	Customizable dashboards that includes tables, charts, and maps and that can display the results of ad- hoc reports.		
3.4.12.	Ability for the system to notify users about warranty expiry based on configured criteria. The system should have the option to calculate the warranty expiry date based on the warranty length and date acquired and choose the number of days prior to expiry to notify the user.		
3.4.13.	The system shall support the real-time monitoring of work order status and provide information required to manage and adjust work as required.		
3.4.14.	Monitor energy performance of fleet, equipment, and building assets, with ability to incorporate various datasets (e.g. electricity, natural gas, gasoline, diesel, water, weather, greenhouse gas emissions).		
3.4.15.	Create alerts when energy reduction initiatives are not being met (e.g. fuel consumption falls outside of target range.).		
3.4.16.	Cluster analysis that can identify geographical areas where problems exist amongst various asset types.		
3.4.17.	Ability to model various long-term financial strategies (ex. Funding optimization, reserve funding analysis, project prioritization).		

3.4.18. Ability to report out at Electoral Area level, including asset systems with multiple Electoral Area funding contributions (ex. Water systems where Electoral Area A provides 75% of operating budget, and Electoral Area B provides 25% of operating budget).		
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<b>3.5. Mobility</b>	<b>Yes</b>	<b>No</b>
3.5.1. Mobile application with the ability to work offline with access to asset and work order records and sync to the network when reconnected to the internet.		
3.5.2. Mobile application using native Windows, Android or Apple IOS tools.		
3.5.3. Mobile application with the ability to make map edits in the field.		
3.5.4. Ability to dispatch Work Orders to 3 <sup>rd</sup> Party contractors.		
3.5.5. Mobile application that accepts voice command to enter work order log notes.		
3.5.6. Mobile application with ability to add/update pictures and custom fields for assets.		
3.5.7. Ability to read QR barcodes for quick access to asset information.		

#### 4. REQUEST FOR PROPOSALS EVALUATION FORM

Proponent's Name: _____			
Project Title: ASSET MANAGAGEMENT SOFTWARE			
Evaluation Date: _____			
Evaluator: _____			
Step 1:		YES	NO
Mandatories	Proposal received prior to closing		
	Title page and Executive Summary provided		
	Business Registration profile		
	Key Members of Implementation Team identified		
	Detailed Timeline included		
	References Provided		
	Complete 5 Year Costing provided		
Step 2:		Assigned Points	Points
Proponent (30 points)	Qualifications of proponent and project team members	10	
	Experience of proponent and project team members	5	
	Past Performance / References	10	
	Resources	5	
Proposal (50 points)	Software Capabilities	15	
	Software Intuitiveness	10	
	Schedule	5	
	Licensing flexibility	3	
	Clarity of Proposal	5	
	Software Support and Training	10	
	Environmental	2	
Price (20 points)	Points for Price = (lowest cost Proposal divided by Proposal being evaluated) x (20% weight)	20	
Total Score	Proponent + Proposal + Price Scores	100	

1. Requests for Proposals (RFP's) shall be reviewed by an Evaluation Team, which shall consist of at least two staff members.
2. Each Evaluation Team member shall complete the RFP Evaluation Form for each Proposal.
3. Evaluation Team Members will use the following list of questions to complete the RFP Evaluation Form:

### **Proponent Evaluation**

- (i) Qualifications of Proponent and Project Team Members  
Are the proponent and project team members specialized and qualified in the nature of the project work?
- (ii) Experience of Proponent and Project Team Members  
Has the proponent completed similar projects during the last three years? Do the assigned project team members have experience with similar projects?
- (iii) Past Performance  
Is the proponent's record of past performance sound? Do reference checks reveal weaknesses? Was abnormal level of monitoring required? Does the proponent consistently complete assignments on time and within budget?
- (iv) Resources  
Does the proponent have ample resources (e.g. staff, equipment, etc.) to apply to this project?

### **Proposal Evaluation**

- (i) Software Capabilities  
Does the proposal clearly demonstrate how the software meets the features identified in Appendix A? Are alternative solutions identified where the software doesn't meet a specific requirement?
- (ii) Software Intuitiveness  
How user friendly is the software? Will it be reasonably easy for non-technical users to learn?
- (iii) Schedule  
Does the Proposal indicate that the achievement of objectives will be met according to an acceptable schedule? Are they within the timelines set by the terms of reference (if outlined in the terms of reference) Are problems or delays accounted for? Is timing realistic for the project?
- (iv) Licensing flexibility  
Does the software accommodate growth if needed at a low cost?
- (v) Clarity of Proposal  
Is the Proposal clear, concise, and logical?
- (vi) Software Support and Training  
Does the proposal indicate the level and timeliness of support by knowledgeable people available to the Regional District? Is training included in the implementation process?
- (vii) Environmental Performance  
Does the proposal adhere to the Environmental Purchasing policies of the Regional District?

### **Price Evaluation**

- (i) Total Price
4. Upon completion of Step 2, the Evaluation Team shall determine, by consensus, the score for each Proposal and will forward these scores to the Board for its consideration to select the successful Proponent.