



REGIONAL DISTRICT OF OKANAGAN-SIMILKAMEEN
REQUEST FOR PROPOSALS
FOR THE PURCHASE OF ASSET MANAGEMENT SOFTWARE

RDOS-22-FIN-07

June 8, 2022

ADDENDUM No. 4

This addendum shall be read into and form part of the RFP documents for the above listed project. Acknowledgement of receipt of this addendum should be made in the Proposal. The Regional District of Okanagan-Similkameen (Regional District) is amending the above listed RFP as follows:

Answers to Questions

Please see the following answers to questions submitted to date.

1. Are there any restrictions regarding the geographic location of project resources that we assign to this project?
 - a. There aren't any specific restrictions on the geographic location of the project with the exception that no data can be hosted or leave Canada. This is a requirement for municipalities and regional districts. As far as implementation and support is concerned, please identify in the proposal how that would work if there is no local representative to assist on site. How will ongoing support be accessed?
2. How many users / what is the user count for various roles?
 - a. With regards to the number of users, we do not have a set number in mind. We will evaluate the proposals based on the licencing parameters provided by the proponent. If there are different ranges or different structures for specific functions (such as a mobile app) then these can be provided as options in the proposal.
 - b. As a very broad comment, our organization is a total of about 140 people or so and we will not require everyone to have access as their positions don't warrant it.
 - c. There will be a number of personnel in our finance, IT, operations, parks & rec, and utilities that will need access. At the very least, a couple from each department (management and technicians).
 - d. Depending on the features and benefits of something like a mobile app, we may decide that all field operators should have it or possibly only a small number. We don't know until we see what your product can do for us.
3. Requirement 3.2.13 - VADIM Integration – What's expected integration with your financial ERP? Single-direction, GL, purchasing, costing, other?
 - a. Ideally it would be 2 way, or at least for the Payables to upload to the AM software to avoid double entry.
 - b. The bare minimum would be for the AM software to upload to Vadim so that the financial records are updated with the capital asset details.

4. Requirement 3.3.16 - Project management – Do you require MS Project integration? Or project work scheduling only inside the CMMS/EAM system?
 - a. Currently MS Project isn't used much. Our Operations Manager does use it to manage projects but other departments simply use a calendar to schedule maintenance tasks. We are looking to see what proposed software can provide and we will decide if it is something that would work for us. The primary goal would be to be as user friendly for our staff to use and isn't overwhelming.
5. How does RDOS manage these processes and data today, and are there any specific data migration requirements?
 - a. At this point, we use a combination of GIS processes. We add new features in house to our SDE database, then publish it to ArcGIS online. Field staff use ArcGIS Field Maps to capture features and add / edit attributes. GIS staff then have to download and reconcile the data back to SDE and add new IDs for the newly captured attributes. Automating this process is a high priority.
 - b. For our financial reporting (PSAB) purposes, we track assets using an excel spreadsheet.
6. Could you please provide information about the number of annual work orders?
 - a. We don't have a W.O. system so this is impossible to identify. We do issue P.O.s. but as these we use paper P.O. books to issue the P.O. so it is difficult to provide an accurate estimate for this at this time.
7. Does RDOS currently have a data warehouse and associated BI tools to facilitate data aggregation, reporting, and analytics across multiple data sources?
 - a. We have all of our data in SQL Server. The GIS components are in SDE (spatial database engine). We have a series of python scripts, and stored procedures in sql server, that aggregate the data from multiple sources.
 - b. For our financials and asset tracking we use Vadim for the data entry of purchases and Questica (Budgeting only for the most part). Our Capital Assets are tracked via Excel. We have additional information on some assets in our GIS system described above.
8. Does RDOS have a preference for on premise or hosted solution?
 - a. There is no preference. We will evaluate all proposals on how well they meet the criteria requirements and on what they can do for our organization.
9. Requirement 3.2.8 refers to "each asset system (e.g. facilities, water, fleet, networking, etc.)." Can RDOS please confirm all of the asset systems/types that are to be included in the software? Could you please provide information about the number and types of assets?
 - a. The asset management plan linked to in the RFP should give a good overview of the types of assets (2020 RDOS Asset Management Plan).
 - b. For the asset types/systems that will be included, the Asset Management Plan document link in Section 2.8 should provide a good overview. 2020 RDOS Asset Management Plan. As a quick summary, we have:
 - i. Water
 - ii. Sewer/Sanitary
 - iii. Solid Waste
 - iv. Buildings & Building Improvements
 - v. Parks
 - vi. Fleet
 - vii. IT infrastructure
 - c. All have assets that will be tracked and managed in the software. In addition to these groupings, it is also imperative that the software has the capability to

view/pull reports based on:

- i. Electoral Area/Municipality
- ii. Financial groupings for PSAB purposes
 - Utilities
 - Buildings
 - Land
 - Machinery & Equipment
 - IT Infrastructure
 - Vehicles

10. Is the Regional District open to a phased approach to implementing the Asset Management Software? For example, by function (Asset Management, Maintenance Management) or by division?

- a. Yes, we are open to a phased approach. We have to have the project well underway before the end of this year because of some grant funding we have. This is also part of the reason we indicated to provide breakdowns on costs associated with different modules (if applicable), such as a Maintenance Management component. We will evaluate the proposals and software to determine what makes the most sense for our organization at this time. As there is such a variety of different packages being used (some that are an all-in-one vs some that are module based). We may also be able to take a phased approach by department as well in the initial implementation. Such as starting with Water/Utilities etc.

11. Are all divisions within the Regional District planning to use the maintenance management software as part of the initial implementation?

- a. We would like to get it up and running for all divisions quickly but the exact timing is something that can be discussed in the demonstration phase as to what makes the most sense. As above, we are open to a phased approach by division.

Signature of Proponent

Note: Proponents should indicate the acknowledgement of the receipt of all the addendums in the Proposal.

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