



City of Billings

Request for Proposals

For

Fleet Management Software

210 North 27th Street P.O. Box 1178, Billings, MT 59101



City of Billings

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Section 1: General Information

Request For Proposals (RFP) – Fleet Management Software

THE ABOVE DESCRIPTION MUST APPEAR ON ALL PROPOSALS AND RELATED CORRESPONDENCE.

THIS IS NOT AN ORDER

PROPOSALS MUST BE <u>RECEIVED</u> NO LATER THAN: Friday, May 29, 2020, at 5:00 pm (MST)	RFP INITIATIVE: Fleet Management Software
<p>All vendors must respond in detail to each element of this RFP in order to be considered for contract award.</p> <ul style="list-style-type: none">• All proposals must be mailed or emailed to contact person at the address below.• No hand-delivered proposals will be accepted in order to prohibit the transmission of COVID-19.• If pricing has been requested, it must be in a separate sealed envelope:• If proposal is mailed, pricing may be included in a sealed envelope; however,• If proposal is emailed, pricing must be mailed in a sealed envelope.• If proposal is mailed, please also include or email an electronic version, minus pricing, of your proposal.	
<p style="text-align: center;">SEND ALL CORRESPONDENCE TO THE CONTACT BELOW:</p> <p style="text-align: center;">City of Billings P.O. Box 1178 Billings, MT 59103</p> <p style="text-align: center;">Larry Deschene, Fleet Services Manager Email: deschenel@billingsmt.gov PHONE: (406) 657-8229 FAX: (406) 657-8211</p>	



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Section 2: Objectives

Introduction and Objectives

This RFP is issued by City of Billings for the purpose of obtaining information and pricing regarding a Fleet Management Software System. It is the intent of the City of Billings to review and assess the RFP responses to determine if the response from solicited vendors can meet the needs of the City of Billings.

Vendors are expected to provide their best and most competitive proposal.

Attachment E, the Intent to Respond form, must be completed and faxed at least two (2) days prior to the advertised RFP due date.

Section 3: Information for Vendors

Disclaimer

This RFP does not form or constitute a contractual document. The City of Billings shall not be liable for any loss, expense, damage or claim arising out of the advice given or not given or statements made or omitted to be made in connection with this RFP. The City also will not be responsible for any expenses which may be incurred in the preparation of this RFP. This RFP is not to be construed as a contract or commitment of any kind.

Instructions to Proposers

EXAMINATION OF DOCUMENTS

Before submitting the proposals, the proposer shall:

- (a) Carefully examine the Standards and Specifications as well as all other attached documents;
- (b) Fully inform yourself of the existing conditions and limitations;
- (c) Include with the proposal sufficient information to cover all items required in the specifications.

PROPOSAL MODIFICATIONS

In addition to any other information and documentation requested in this RFP, any forms provided herein shall be included in the submitted proposal. Modifications, additions or changes to the terms and conditions of this request for proposals may be cause for rejection of the proposal. Proposals submitted without required forms may be rejected. No oral, telephone, Email, fax or telegraphic proposals or modifications will be considered.



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CERTIFICATION OF ALTERATION OR ERASURE

A proposal shall be rejected should it contain any material alteration or erasure, unless, before the proposal is submitted each such alteration or erasure has been initialed in INK by the authorized agent signing the proposal.

SIGNATURE

All proposals shall be typewritten or prepared in ink and must be signed in longhand by the proposer or proposer's agent or designee, with his/her usual signature. A proposal submitted by a partnership must be signed with the partnership name to be followed by the signature and designation of the partner signing. Proposals by corporations must be signed with the legal name of the corporation, followed by the name and signature of an authorized agent or officer of the corporation. Proposals submitted by a proprietorship must be signed by the owner-and the name of each person signing shall be typed or printed legibly below the signature.

WITHDRAWAL OF PROPOSALS

Proposers may withdraw their proposal either personally or by written request at any time prior to the due date set for receiving proposals. No proposal may be withdrawn or modified after the due date and time, unless and until the award of the contract is delayed for a period exceeding ninety (90) days.

QUOTE VALID

The proposer must honor their quote for a period of ninety (90) days after the RFP due date.

CERTIFICATION

The proposer certifies that the proposal has been arrived at independently and has been submitted without any collusion designed to limit competition. The proposer further certifies that the materials, products, services and/or goods offered herein meet all requirements of the stated specifications and are equal in quality, value and performance with highest quality, nationally advertised brand and/or trade names.

INSURANCE REQUIREMENTS

The proposer certifies that it/they can comply with the City of Billings insurance requirements of Commercial General Liability and Automobile insurance each in the minimum amounts of \$750,000 per claim and \$1,500,000 per occurrence, with the City being named as an additional insured.

The successful proposer will be required to purchase a City business license and complete the new vendor forms in order to be eligible for payment.

DISPOSITION OF PROPOSALS

All materials submitted in response to this RFP become public records under Article II, Section 9 of the Montana Constitution and §§ 2-6-102 and 7-1-4144, MCA and may be distributed by written request pursuant to Montana's Constitutional Right to Know or Public Records Acts.

Information provided in response to this RFP will be held in confidence and will not be revealed or discussed with competitors prior to award of Contract by Council. However, one copy of each proposal submitted shall be retained for the official files of the Department and will become public record after award of the Contract. Fee or Price schedules submitted, but not reviewed by the City, do not become a public record and shall only be retained for official files.



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Records and materials that are constitutionally protected from disclosure are not subject to the provisions of this section.

The Consultant understands that, if selected, the City reserves the right to provide its opinion publicly and privately regarding the Consultant's performance.

QUESTIONS

Questions regarding the Request for Proposals contents must be sent to the contact person listed in Section 1 no later than 2 business days prior to due date for proposals. The City of Billings will make every effort to provide a written response within 2 business days. Whenever responses to inquiries would constitute a modification or addition to the original RFP, the reply will be made in the form of an addendum to the Request for Proposals, a copy of which will be forwarded to all Vendors who have submitted an "Intent to Respond" form (Attachment E).

Vendor must submit their questions via Email using the "Master Q & A" form found in **Attachment D**, and provide, at a minimum, the following:

- Vendor's name, requester, and appropriate contact information.
- The question, clearly stated.
- Specific reference to the applicable Request for Proposals section(s).

RFP Submission

Upon the submission of the RFP response, the vendor acknowledges that all information is accurate and complete.

- **All proposals must be mailed or emailed to contact person in Section 1.**
- **No hand-delivered proposals will be accepted in order to prohibit the transmission of COVID-19.**
- **If pricing has been requested, it must be in a separate sealed envelope:**
- **If proposal is mailed, pricing may be included in a sealed envelope; however,**
- **If proposal is emailed, pricing must be mailed in a sealed envelope.**
- **If proposal is mailed, please also include or email an electronic version, minus pricing, of your proposal.**

Section 4: RFP Evaluation and Selection Processes

Initial Evaluation

Proposals received will undergo an initial review to determine:

- Compliance with instructions stated in the RFP
- Compliance with proposal submittal date

Phase II Evaluation

The evaluation of vendor's proposals may include, but is not limited to, the following criteria:

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- Experience of Vendor with goods/services required by the City of Billings
- Technical capabilities
- Perceived ability to meet the City of Billings requirements
- Quality of interface To/From existing Innoprise Financial Software
- Ability to import data from external sources
- Total Cost Competitiveness
- Availability (timetable) for providing goods and/or services
- Breadth of services available
- Company's financial stability
- Ongoing support
- Quality Control Process
- Process Improvements
- Training
- Compliance with the City of Billings Terms and Conditions
- References

The City reserves the right to conduct interviews with all or some of the Proposers at any point during the evaluation process. However, the City may determine that interviews are not necessary. In the event interviews are conducted, information provided during the interview process shall be taken into consideration when evaluating firms using the above-stated criteria.

The City also reserves the right to make such additional investigation as it deems necessary to establish the competence and financial stability of any firm submitting a proposal.

Section 5: Scope of Work

Below is a general outline of the anticipated scope of work. However, the final scope of work will be negotiated with the successful proposer.

Summary

The City of Billings consists of multiple departments. The Fleet Services Division provides maintenance and repair service to City Departments for over 1100 pieces of equipment ranging from small gas-powered equipment to trailers, cars, pickups, trucks, police vehicles, fire equipment, construction equipment and refuse equipment.

The City's Fleet and Inventory management systems are currently operated on the Sungard HTE software system utilizing an AS400 operating system.

Operating revenues are generated from services provided including mechanic labor, parts and fuel markups and equipment rentals.

Work orders are billed out to customers, similar to a private maintenance shop. Billing is performed in real-time when parts are scanned from inventory or when a vendor parts invoice is paid and when mechanic labor is entered. Work order transactions are billed to user departments via the City's Harris Innoprise financial system. In addition, parts billed directly to a vehicle and fuel transactions are billed through the Fleet system and interfaced with financials.

Barcode scanners are used to scan parts to work orders or directly to an asset or technician. Barcode scanners are also used to conduct the annual physical parts and fluids inventories.



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The City operates several separate locations and parts warehouses. The current system securely segregates these locations and information for designated equipment, and separate parts and fluids inventories are accessible at each location by assigned permissions.

The City operates fueling systems at various locations with Gasboy Head Office software and Islander plus controllers. Fuel transactions are imported to the fleet management system for meter updates and transaction billing along with applicable markups.

Scheduled maintenance frequencies are setup for each piece of equipment along with attached task lists for each schedule for printing or displaying with work orders when they become due.

The City is seeking a Fleet Management Software solution to manage their daily fleet and inventory activities including work order generation, mechanic labor, inventoried and non-inventoried parts, fuel, lubricants and tire transactions. The City is seeking either a local based or cloud-based software solution that can provide an interface to our Innoprise ERP Solution and meet the fleet maintenance management needs of the entire organization including multiple maintenance and warehouse locations.

A Fleet Management Software Solution will provide a comprehensive fleet management and inventory system solution for the City fleet. In your proposal, please provide:

1. Company background
 - 1.1 Describe your company's background including how long the company has been in this type of business?
2. Company Qualifications
 - 2.1 Has your company worked with many cities/counties on fleet and inventory management software systems and have a good understanding of local government fleet maintenance operations?
 - 2.2 How many fleet/inventory management Installations has your company done? Please provide information on how many of these are customer on-premise installations and how many are hosted in a SaaS (Software as a Service) environment?
3. Hardware Requirements
 - 3.1 If the solution is locally hosted/on-premise, the City will provide the VM servers used to host the solution.
For each server required, describe the purpose (database, application, web) of the server and define the requirements needed to support the solution.
 - 3.1.1 Processers
 - 3.1.2 RAM
 - 3.1.3 Hard Drive
 - 3.1.4 Operating System – Windows 2016 or higher
 - 3.1.5 Database – Microsoft SQL Server 2016 or higher
 - 3.1.6 Does it support a VM server environment?



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3.1.7 Other – are there other server, infrastructure components, or licensed software the City needs to supply to support the solution?

3.2 If the solution is cloud based:

3.2.1 What additional hardware is required by the City?

3.2.2 Pricing model - Please provide information about the model and structure of how we are charged for a cloud-based solution.

3.2.3 Who is responsible for maintaining the upgrades to your fleet/inventory management solution, the server operating system(s), database maintenance, server health, security settings? In other words, do you offer a full SaaS hosted solution?

3.2.4 What are the recommended ISP bandwidth recommendations for optimal solution performance to our end users?

3.2.5 Describe your Encryption process for a cloud-based solution.

3.2.6 Provide information on your backup strategy, redundancies, and disaster/recovery.

3.2.7 The City may wish to periodically (annually, upon request, end of contract, etc.) receive a copy of our fleet/inventory database. We would store the database at our facilities to serve as an additional backup level and not for normal processing. Is it possible for the City to periodically obtain an electronic copy of our database? If so, how have you done this with other customers?

3.3 End-user hardware requirements. Be specific if there is any proprietary hardware needed.

3.3.1 Provide information on hardware required for:

3.3.1.1 Back office, technician tablets, and mobile devices.

3.3.1.2 Barcode scanners and barcode printers.

4. Software Requirements

4.1 Must support a Windows 10 environment.

4.2 Is the system browser based or do endpoints require a client for your solution?

4.3 Does the system operate on a thin client without requiring additional software installation on the end user workstation?

4.4 Describe your software licensing model. Is your software licensed per workstation, per user, concurrent licensing, no separate licensing required, etc.?

4.5 Explain any encryption functionality incorporated into the software.

4.6 Is there additional software, not listed above and not provided with the proposed system that is required?



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Section 5: System Features and Function

The City is looking for a complete fleet and inventory management solution that will provide Work Order Management; Vehicle & Equipment Management; Shop Management; Barcoding & Handheld Data Management; Parts & Fluids Inventory Management; Purchase Orders & Invoice Management; System Configuration Flexibility; Mobile Data Options, and Analytics/Reporting. The ability to import, manage, and search/retrieve fleet asset related records. The solution must increase staff productivity along with accountability, improve customer service quality and timeliness, and improve departments' business processes. The solution must provide immediate work order, inventory item and maintenance history retrieval for research purposes and greatly improve our ability to fulfill requests from staff.

5. Explain how your software's Work Order Management module works. Describe in detail how work orders can be initiated whether it is for preventive maintenance, in-field work orders, or shop work orders. Describe any efficiencies that your software provides that can expedite this process while maintaining strong records on each asset.
 - 5.1 When generating a new work order, describe what background data from the asset is brought into the work order once the unit # is entered.
 - 5.2 Describe the workflow for a work request sent from your mobile app and the process for generating a work order from that request.
 - 5.3 Describe your quick view shop and work order management screens.
 - 5.4 Describe the complete process for paperless work orders from generation to assignment, inventoried and non-inventoried parts issues, mechanic labor entries, work order closing and work order invoicing.
 - 5.5 Does your paperless work order system allow for direct mechanic labor time entry to work orders as opposed to clocking on and off?
 - 5.6 What system codes are used (components, reason for work, work class etc.)?
 - 5.7 Describe the process for scanning parts to a work order.
 - 5.8 When a work order is closed, is an invoice produced? Can it be printed?
6. Explain the functionality of your Vehicle and Equipment Management module. Include details on repair history including warranty tracking; recall tracking; equipment replacement tracking; preventive maintenance tracking; and scheduled maintenance.
 - 6.1 Describe how non-inventoried parts are attached to a vehicle, work order, and job. Can it be charged/attached to a vehicle without a work order?
 - 6.2 Describe your scheduled maintenance process including any fuel and meter import capabilities.
 - 6.2.1 Describe the scheduled maintenance entry format for various PM levels and task lists for each?
 - 6.2.2 Can existing scheduled maintenance data, including frequencies and task lists be imported to your software?
 - 6.2.3 Does your system produce a preliminary listing for scheduled maintenance due for review prior to work order generation?

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- 6.3 Explain any forecasting capabilities included in your preventive maintenance tracking.
- 6.4 Explain process for mechanics to access maintenance history quickly and efficiently.
7. In a Fleet Management software, it is important to understand how the shop processes flow between parts, inventory, and vehicle. As a shop that charges for every service, this process needs to be efficient to save time wherever possible. The back-office software needs to be able to track these processes and productivity.
 - 7.1 Explain how your software makes the workflow between parts, inventory, vehicles, inventory, tires, lube products, and fuel efficient and easy to visualize, manage, and report on.
 - 7.2 Does your software include a Work Order "Quick View"? Explain.
 - 7.3 To run an efficient shop, it is necessary to have the ability to schedule jobs. Describe your scheduling process.
 - 7.4 How does your software provide mechanic productivity tracking? Explain.
 - 7.5 Describe how a technician can look at vehicle history, work orders, scheduled maintenance etc.
 - 7.6 Describe the Employee (mechanic) file setup in your system (Classifications, labor rates, employee #'s etc.) and the process for mechanic labor rates being applied to work orders.
 - 7.7 Does your software allow for multi location management capabilities with segregations from main fleet and inventory?
8. Currently, the City of Billings uses a 3rd party vendor for their Barcode integration into their Fleet Management software. Barcode scanning, printing, and integration is important to a well-organized shop.
 - 8.1 Does your software use a 3rd party vendor for barcode functionality?
 - 8.1.1 If so, do you integrate with multiple barcode vendors? Please explain the integration and costs associated with this integration.
 - 8.1.2 If not, is barcode integration part of your standard software package? Explain.
 - 8.2 Describe the process for scanning inventoried parts to a work order.
 - 8.3 Describe the process for scanning inventoried parts directly to a vehicle without a work order.
 - 8.4 Describe the process for scanning mechanic labor transactions to a work order.
 - 8.5 Provide specifications on barcode scanners, printers, labels that are required for your barcode process. Include wireless handheld and/or technician tablet options.
9. Explain your parts and fluids inventory process including parts inventory tracking, vendor tracking, parts usage reporting, parts warranty tracking, and parts and fluids markups.
 - 9.1 Describe the process for adding a new part to your inventory software including if your software includes OE parts referencing or an interface with parts vendors such as NAPA, Carquest, etc.



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- 9.2 Markups play an important role when charging out costs. These markups need to be customizable between locations and by type. Explain your markup process.
 - 9.2.1 Markups are segregated for parts, fuel, and tires, describe your reporting format for these markups and how markups for inventoried and non-inventoried items are setup for import to the financial system.
 - 9.2.2 How are markups on parts and fluids applied?
 - 9.2.3 Can markups be assigned and controlled by maintenance locations?
 - 9.2.4 How does the system handle markups and billing for equipment worked on at a different location?
- 9.3 Fuel and Meters
 - 9.3.1 Describe how fuel transactions are imported from an automated fueling a system? Manual entry?
 - 9.3.2 How are meters updated when fuel transactions are imported? Is there a reasonability check?
 - 9.3.3 Can meters be changed in the system? Will the change accurately calculate scheduled maintenance values?
 - 9.3.4 When a meter is changed, does it make a global change within your software?
10. The City of Billings currently utilizes Harris' Innoprise Financial system for purchase orders and invoices. This information is currently imported from our current Fleet Management system that lives in HTE. In Innoprise, an approval workflow process is completed, checks are processed, then the information is posted into our general ledger. Explain in detail your company's philosophy for purchase orders and invoice management and how you see this integration with our Financial system.
11. Provide details on your purchase orders and invoice management process. Seamless processing with work orders and parts inventory are important.
 - 11.1 An invoice could include inventoried parts, non-inventoried parts, and costs not associated with inventory including global cost including shop supplies or hazardous waste. Does your software allow for multiple different line items on one invoice? Explain.
 - 11.2 When a purchase order system is not used, describe how vendor invoices are entered into your software?
 - 11.3 When a purchase order system is not used, describe how the invoice line item description and cost is attached to appropriate vehicle, work order and job number?
 - 11.4 When a purchase order system is not used, describe the workflow of an inventoried parts invoice entered into your software system.
 - 11.5 Are scanned vendor documents able to be be attached to the appropriate asset and work order? Explain.



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- 11.6 Once the invoice information is entered into the fleet software, the vendor information, amount, account number and scanned invoice needs to be imported to Financials, describe your process for accomplishing this.
 - 11.7 Describe the billing process. Is there an option to bill in real time (at the time parts and labor are added to the work order)?
 - 11.8 Is customer inter-department billing a part of your system? Explain.
 - 11.9 Is budgeting a functionality included in your system? Explain.
12. What mobile options does your software provide? Does this include the ability to manage parts inventory and fleet activities; scan parts; log vehicle defects and allow driver work requests; update vehicle meters; and view vehicle information? Please provide detail on your mobile solution.
- 12.1 Is there a separate mobile application needed for this process? Explain.
13. Describe the reporting and analytics tools available in your system. Include examples of canned reports.
- 13.1 Provide specifics on how customized reports can be created. Is there a tool to create these reports? Describe its capabilities and what types of reports can be created.
 - 13.2 Explain any flexibility in your reporting module. For example, does your reporting module allow for many parameters that make running reports for many different scenarios possible?
 - 13.3 Explain your solutions ability to export documents and reports.
14. Describe the security process.
- 14.1 Explain in detail the security controls including software security settings; restricting access by user, function, and project.
 - 14.2 Explain Encryption standards that are in place for your software.
 - 14.3 Is your software integrated into Active Directory?
 - 14.4 Does your solution store any Personally Identifiable Information (PII)? If so, is there built-in measures to protect it?
 - 14.5 Describe the auditing process. For example, can the software track who has made changes in the software?

Section 7: Interface Requirements, Implementation and Training

- 7.1 The software for this system must intergrate into the existing Financial software in use at the City of Billings. The City uses Harris Computer Systems Innoprise Software for the ERP solution which runs on a SQL database.
 - 7.1.1 If your solution has an existing interface to Innoprise Financial application, please provide detailed information about the interface, including details on: Fixed Assets, Vendors, Purchase Order and Invoice creation and approval process, Inventory, Attachment/document sharing between applications.

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- 7.1.2 If your solution does not have an existing interface to Innoprise Financial application, please indicate your plans to do so or recommendations on how the City can meet our interoperability goals between your solution and Innoprise Financial application including defined process for maintaining Fixed Assets and Vendors, Purchase Order and Invoice creation and approval process, Inventory, Attachment/document sharing between applications. For more information about the required Innoprise interface please contact ERP-Sales@harriscomputer.com. Your interface costs must be included.
- 7.1.3 Have you interfaced to other Financial systems?
 - 7.1.3.1 What does a typical interface consist of and how is it accomplished? Real-time, 2-way between systems, what data is shared between systems.
- 7.2 If your solution requires integration to a 3rd party barcoding vendor, please explain how this will be accomplished and what costs and process will the City of Billings need to put in place to be successful in this implementation?
- 7.3 The software must include a fuel transaction & meter interface with Gasboy.
- 7.2 Explain any integration with Microsoft Office products, i.e. Email, Calendar, SharePoint, Teams, etc.
- 7.3 Explain any integration with a Centralized Document Management solution.
- 7.4 How is integration done? API's, tool-kits, web services, custom development?
- 7.5 Implementation
 - 7.5.1 Project Management – Describe the implementation methodology including analysis, requirements definition, key milestones, system testing, system launch and the estimated duration of the project.
 - 7.5.2 City Roles and Responsibilities – Describe the resources needed from the City during installation, configuration, and testing.
 - 7.5.3 Role
 - 7.5.4 Skillset needed
 - 7.5.5 Estimated duration of involvement
- 7.6 Training
 - 7.6.1 Describe the training needed including the training format (online, classroom, instructor led, train the trainer) and time requirements for each type of training.
 - 7.6.2 Will the training provide assistance in examining our workflow processes and procedures and integrating them into the new system?
 - 7.6.3 Describe in detail your system training program.
 - 7.3.3.1 Full System On-Site training
 - 7.3.3.2 On-Line training
 - 7.3.3.3 Regional Training



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Section 8: Conversion of current documents into new solution

- 8.1 The City has fleet and inventory files, histories, codes, work orders, stock items and vehicle information stored in our Sungard HTE software system. Describe the process your company would go through to import the existing HTE files into your proposed solution. The solution must address these areas:
 - 8.1.1 Importing asset data from our H T E Fleet system (asset description, VIN#, engine & component information, owner dept., billing account #'s etc.) to your software in the appropriate fields.
 - 8.1.2 Importing existing maintenance history from our H T E system to your software.
 - 8.1.3 Each asset in our H T E Fleet Management system has billing expense and revenue account numbers attached for appropriate cost charging and revenue generation of parts, fluids and markup transactions. Explain how these account numbers will be imported to your system and appropriately interfaced to our Innoprise financial system for transaction billing.
 - 8.1.4 Import our existing H T E parts inventory files into your software.
 - 8.1.5 Import existing PM data (frequencies and task lists)

Section 9: Maintenance and Support

- 9.1 Support: Describe the support provided after the installation is complete for both an on-premise and cloud-hosted solution
 - 9.1.1 Types of Customer Service (help desk/online submission of service request)
 - 9.1.2 Service Level Agreements/Response Times
 - 9.1.3 Problem Escalation
 - 9.1.4 Support Hours
 - 9.1.5 Other Support not listed above
- 9.2 Software Maintenance
 - 9.2.1 How frequently does the software get updated?
 - 9.2.2 Are there release notes describing functional updates when a new release is provided?

Section 10:

What sets you apart from other Vendors?



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ATTACHMENT A

VALIDATION QUESTIONS FOR VENDOR

GENERAL INFORMATION

- 1) Company Name
Address:
Contact Name:
Contact Phone:
Contact Email:
Website/URL:
- 2) How many facilities/locations do you have in the U.S? Please list.
- 3) How many years has your company been doing business under this name?
- 4) Total Full-Time Employees.
- 5) Do you have Small Business Administration Status? If yes, can you provide documentation?
- 6) What are your standard payment terms?
- 7) References - Please attach a Word® document with all contact information for at least the following three references:
 - a) New Company (started doing business with them in the past 12 months)
 - b) Retained Company (have been doing business with them for 3 + years)
 - c) Former Company (contract terminated in the past 2 years)
- 8) Can you provide a statement and meet the City of Billings minimum insurance requirements of \$750,000 per claim and \$1,500,000 per occurrence, and the City being named as an additional insured?

FUNCTIONALITY

- 1) A certificate of insurance must be provided prior to signing the contract, commencing on the day contract begins. Are you willing to comply with these requirements?
- 2) You must instruct your insurance broker/carrier to notify the City of Billings should your coverage change. Are you willing to do this?
- 3) The successful proposer will be required to purchase a City business license and complete the new vendor forms in order to be eligible for payment. Are you willing to do this?

QUALITY AND SERVICE

- 1) Do you have a quality assurance program? If yes, please attach a copy.
- 2) Are your employees required to take a mandatory drug test?

LEGAL ISSUES

- 1) Are there any pending lawsuits against your company? If yes, please explain.



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ATTACHMENT B

PRICE MATRIX

(to be sent with proposal in a separate, sealed envelope)

Fleet Management Software

Local Hosting “On-Premise” Option	Price
Software Licensing	
Software – Ongoing Licensing/Maintenance	
Interface to Innoprise Financials (Provide List of Interfaces)	
Interface Costs – On-going	
Training (Include Details on # of Hours/Days, Per Diem, Content, On-Site/Remote, Etc.)	
Other Costs (Provide Details)	
**City will provide application & database hardware along with Microsoft O/S & application software per your defined requirements	
Local Hosting Option Totals:	

Cloud-Based / SAAS Option(s)	Price
Initial Setup Cost	
Cloud-Based/SAAS Hosting Expenses (Provide Details)	
Software Licensing/Maintenance	
Software – Ongoing Licensing/Maintenance	
Interface to Innoprise Financials (Provide List of Interfaces)	
Interface Costs - Ongoing	
Training (Include Details on # of Hours/Days, Per Diem, Content, On-Site/Remote, Etc.)	
Other Costs (Provide Details)	
Cloud-Based / SAAS Option Totals:	



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ATTACHMENT B (continued)

PRICE MATRIX

(to be sent with proposal in a separate, sealed envelope)

Other Expenses	Price
Conversion costs from moving HTE data into Fleet software	

Please attached additional pages to provide more detail on above pricing and any other expenses associated with this proposed solution.

Company Name

Date

Contact Name (please print)

Title

Signature of Contact Position

By signing the above, I certify that I am authorized by the Company named above to respond to this request.



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ATTACHMENT C

CONDITIONS AND NON-COLLUSION FORM

To receive consideration, this form must be signed in full by a responsible, authorized agent, officer, employee or representative of your firm.

CONDITIONS AND NON-COLLUSION AGREEMENT

We have read and agree to the conditions and stipulations contained herein and to the Standard Terms and Conditions contained on the attached.

We further agree to furnish the services specified at the prices stated herein, to be delivered to the location and on that date set forth herein.

In signing this proposal, you also certify that you have not, either directly or indirectly, entered into any agreement or participated in any collusion or otherwise taken any action in restraint of free competition; that no attempt has been made to induce any other person or firm to submit or not to submit a proposal; that this proposal has been independently arrived at without collusion with any other proposer, competitor or potential competitor; that this proposal has not been knowingly disclosed prior to the due date and time to any other proposer or competitor; that the above statement is accurate under penalty of perjury.

_____	_____
Legal Name of Firm/Corporation	Authorized Signature
_____	_____
Address	Printed Name
_____	_____
City/State/Zip	Title
_____	_____
Date	Telephone Number



City of Billings

ATTACHMENT D

MASTER Q & A FORM

PROJECT: Fleet Management Software Solution

Master Q&A	Any questions regarding this Request for Proposals should be submitted according to the process outlined below. The City will make every effort to answer within two (2) days of receiving the questions.
Q&A Process	<ol style="list-style-type: none"> 1. Prepare questions or concerns on the template provided. 2. Complete the table in full, providing a date for each question and a section of the RFP to reference (if applicable). 3. Submit the completed form via Email to deschenel@billingsmt.gov. Attach associated documents as necessary. <p>Please contact Larry Deschene with any questions regarding this process.</p>

Questions from: _____ **Company:** _____

Email Address: _____

#	Date	Reference Section	Question or Comment	City Response
1				
2				
3				
4				



City of Billings

ATTACHMENT F

PROPOSER CONTACT INFORMATION

A. Company Contacts

Primary Contact Person (Name):	
Title/Function:	
Address	
Business Hours Phone:	
Fax:	
Internet Email Address:	
Name of Person Responding to Request:	
Title/Function:	
Address:	
Phone:	
Fax:	
Internet Email Address:	

B. General Company and Financial Information

Company Name:	
Headquarters Address:	
City, State, ZIP	
Headquarters Phone:	
Headquarters FAX:	
Company Owned By:	
Percent % Ownership:	
Years In Business	
Name of CIO	
Name of CEO/President:	

ADDENDUM #1

Issued May 19, 2020

PROJECT: Fleet Management Software Solution

#	Date	Reference Section	Question or Comment	City Response
1	5/7/2020		Is this an all-or-nothing RFP or may we participate in one particular requested Fleet Management inventory control requirement?	At this time, only all-inclusive solutions are being considered.
2	5/7/2020		Can you please clarify or describe your expectation for billing/purchase order procedures? Is it your plan to still use Harris/Innoprise for purchase orders and billing or are you looking to move that function over to the Fleet system? We offer a stand alone Asset Management/Fleet Management capability and we have our own ERP system that handles purchasing and billing. In your case, if we were to propose our Fleet solution, we would be feeding the City's Innoprise system since you would not be using our ERP/Financial system.	Our expectation would be to pay and attach the invoice on the Fleet system without using the purchase order function. Billing functions would also be processed on the Fleet system for appropriate charges and markups being attached to work orders and or assets. The billing transactions would be imported to the City's Innoprise financial system from the Fleet system, this would require the transaction amounts and the markups to be associated with and accompanied by the appropriate billing account numbers. Specific questions regarding your inquiry are included in our RFP in section 11, pages 12 & 13. Invoices would still be imported from the Fleet system, approved and paid through Innoprise, we are looking for invoices to be entered, scanned images attached, and the information to populate correctly in the Fleet asset/work management areas of the new software.
3	5/7/2020		What fleet management software systems are you familiar with or what systems have you seen prior to issuing this RFP?	We are most familiar with the Sungard H T E Fleet & Inventory Management system.
4	5/7/2020		What are your budget expectations for the new fleet system? Many systems range from very low price points, below \$50,000 in some cases, and other systems can be much higher. If you are not comfortable sharing budget for the system, can you provide a range that you are working with? Page 1 of 4	We are not prepared to set a budget amount. We are seeking a system that meets our requirements and you would need to price your product accordingly.
5	5/8/2020	Summary	What are the dates you plan on moving forward with the following: product selection	Tentative timeline is as follows: Selection by June 30 Purchase by July 10

6	5/8/2020	7.1	Please describe your Innoprise ERP integration requirements in detail.	<p>Invoices would be entered in the Fleet/Inventory system along with a scanned copy of the invoice. All required cost and markup transactions for inventoried and non-inventoried items would be attached to the appropriate asset, work order and inventory item adjustments. The transaction detail including date, costs, quantities, expense and revenue account numbers, scanned invoice copy, department name and person's name entering invoice will be interfaced with our Harris Innoprise Financial system. The integration will be on a daily basis.</p> <p>There would be no on-going integration with SunGard H T E. H T E would be immobilized once the new system is implemented.</p>
7	5/8	Section 5: Scope of Work	<p>Of the 1100 pieces of equipment stated on page 7, How many assets do you have that meet the following definitions:</p> <p>Active parent assets that are being maintained and tracked in the software. Which are defined as originally valued at \$5000 or greater and active. These assets are the parent piece of equipment and not a child asset. A child asset is any asset, regardless of cost, that is either permanently or temporarily attached to another piece of equipment. Examples of child assets are; radios, generators, plows, light bars and so on.– Your Count ???</p> <p>Active parent asset (do not include child assets in this count either) originally valued at less than \$5000 and more than \$500– Your Count ???</p> <p>Fuel Only Assets - These are separate vehicles from those counted above where only fuel data is tracked in the software. -</p>	<p>We currently have 1185 assets on file. 895 are valued over \$5,000. 83 are valued between \$500 and \$5,000. The remaining 207 are trailers, generators, compressors, shop machines, snow plows and blowers, chain saws and other misc. small equipment. Some of these may be valued over \$500, but cost records are not available for them. We have approximately 100 pieces of equipment that are attachable to another piece of equipment, however we do track each asset individually for scheduled maintenance by miles, hours and/or days. For example: a snow plow can be attached to one or several dump trucks, but the snow plow is inventoried with its own file and tracked accordingly. This inventory does not include items like light bars, radios etc.</p> <p>860 of the 1185 assets use fuel. Approximately 700 are currently tracking fuel transactions through the fleet system.</p>

			Your Count ???	
8	5/13/2020	Question 7.1.2	Is there different contact information at Harris Computer for the Innorprise Interface? When we tried to contact them using the provided email address, the email bounced back to us as undeliverable: "Your message can't be delivered because you do not have permissions to send to this distribution list. Ask the owner of the distribution list to grant you permissions and then try again."	Dan Frelund would be the best contact at dfreland@harriscomputer.com
9	5/14/2020	Page 11-#8	Currently, the City of Billings uses a 3rd party vendor for their Barcode integration into their Fleet Management software. Barcode scanning, printing, and integration is important to a well-organized shop. Please advise the current 3rd party barcoding software and hardware used.	The third party software company is Quatred Touchless Technologies, 532 4th Range Rd., Pembroke, NH. Ph. 888-395-8534. Scanners are Motorola Symbol Technologies, Model SK1-MC9090.
10	5/15/2020	N/A	Would the City be willing to extend the deadline by 2 weeks to ensure we are able to provide a thorough response?	We are not considering an extension at this time.
11	5/15/2020	Page 15-#8.1	Our solution includes a fully integrated inventory management system as a part of the core product. As such, would SunGard HTE remain the system of record for inventory? If yes, would there be a desire for an integration between the new fleet management system and HTE? Could you describe how you would like such an integration operate?	We would require Fleet and Inventory management to be a fully integrated product. SunGard HTE would not be used following implementation of the new software.

12	5/15/2020	Page 13- #7.1	For an integration with the Innoprise system could you described the preferred method to push billing transactions? Is a once a month flat file push sufficient or is a more real-time (REST web service) bi-directional integration preferred?	A real-time bi-directional integration is preferred.
13	5/14	Billings Website M-TH; 7AM-5PM; CLOSED FRIDAYS	Will there be someone available to receive the pricing proposals on the due date of Friday, May 29 th ?	The proposal may be emailed or mailed, but the price matrix is to be mailed in a separate envelope. (please see additional information in item 15 below)
14	5/18	Question 8.1.3	What is the length of your billing expense number? What is the length of your billing revenue account number? Can you provide definition of the account string to include the elements?	Both expense and revenue account numbers are 17 spaces including dashes as follows: 0000-11111-222222. The first segment is the fund, the second segment is the Dept./Division and the third segment is the object.
15	5/19/2020	1: General Information	Regarding "If proposal is emailed, pricing must be mailed in a sealed envelope." Would the City be willing to accept pricing as a separate electronic document in the email instead of a hard copy? We are having some difficulty shipping hard copies due to our office closure.	If conventional mailing is not possible due to office closures, the City will accept separate electronic pricing document by email. The email must clearly state "Confidential Pricing" in the subject line.