



Construction Management Information System (CMIS) Software

**Request for Proposal
Questions & Answers**

May 11, 2021

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1.1 General Questions

1.1.1 Vendor Qualifications

1. Can companies not based in the United States apply?
 - Yes, non-US based companies may apply.
2. Are there any preference for local or California-based company?
 - Please refer to Contract Equity Program information referenced in the RFP.
3. Are in-person meetings required for project implementation?
 - No, in-person meetings are not necessarily required.
4. Can we perform the tasks (related to RFP) outside of the United States?
 - Yes, tasks may be performed outside of the United States.
5. Can the vendor include offshore resources in the proposal?
 - EBMUD prefers onshore, on-site consulting service delivery, but proposers may include the resources required to maximize project success.

1.1.2 Budget & Pricing

6. What is the budget for this solution?
 - There is no defined budget for this project yet.
7. Is there a not-to-exceed budget you'd like this system to stay under?
 - No, a budget has not yet been defined for this project.
8. Is the District open to a three-year agreement vs. 5 year with single year option?
 - Yes. Additionally, you may submit more than one proposal.
9. Would EBMUD like additional pricing for the proposed integrations?
 - Yes, please itemize each additional integration.
10. Where or how would the software license agreement be included in the responder's proposal?
 - Include license agreement with the pricing information.
11. Shall the Vendor provide a copy of the Vendor's Subscription Support Agreement for the EBMUD to review?

- As above.

12. In **Exhibit H – Pricing Worksheet**, what is the difference between Tab 1, Line 18 (Cost for Expected Interfaces) and Tab 2, line 14 (analyzing and building interfaces)?

- Please complete the Pricing Worksheet as you deem appropriate, adding itemized lines where necessary. Ultimately, all line items should roll up to the six summary line items on Tab 3.

1.1.3 Schedule

13. Would the District be open to extending the proposal due date?

- No, the District will not extend the proposal due date.

14. What is the anticipated award date of the contract and start date of the project?

- Implementation is expected to begin immediately after Board of Director approval of the contract.

15. What is the timeline for initial launch?

- Implementation is expected to begin immediately after Board of Director approval of the contract.
- Implementation timelines would be based upon the selected solution.

16. What is the timeline for having the solution completely integrated with other software currently in use? Is there an anticipated go-live date for the solution?

- Implementation timelines would be based upon the selected solution. Consider the business stakeholders would like to implement the new CMIS as soon as feasible. The new CMIS may be implemented in serial replacement of the current CMIS or in parallel as current CMIS is retired. Enhancements may additionally be phased after go-live.

17. Does the District anticipate a full implementation in a single phase or multiple phases?

- Proposals should include the proposers recommended strategy for implementation. Implementation timelines would be based upon the selected solution.

1.1.4 Other RFP Procedure Questions

18. Can we submit the proposals via email?

- Yes. Submittals must be submitted either by email or uploaded to EBMUD's Dropbox. Please refer to instructions in the **RFP, Section V. RFP Response Submittal Instructions and Information**.

19. Can EBMUD provide a breakdown of points/percentages that will be used to evaluate proposals for this project? Can you provide the weights for the evaluation criteria given?

- Please refer to the **RFP, Section IV. District Procedures, Terms, and Conditions**. No additional detail can be provided at this time.
20. Will there be a pre-bid conference? Or, can vendor scheduled a conference call or virtual meeting with your Project Team and interested stakeholders?
- There will be no pre-bid conference. No, vendors may not hold a conference call or virtual meeting with stakeholders prior to RFP submission.
21. May we ask additional questions after the initial Q&A?
- You may ask additional questions, but there is no guarantee we would provide a timely answer equally and publicly to all vendors. However, please continue to monitor our website as we may post additional addenda or other announcements.
22. In **Exhibit B – Insurance Requirements**, there is a signature line for the insurance agent. Is it acceptable to attach the standard COI in place of having the agent actually sign the **Exhibit B** paperwork?
- Please refer to the introduction paragraph of **Exhibit B**. A standard COI is not required with your proposal at this time.
23. **Exhibit E – Functional Requirements Response Form** has numerous rows that are header detail (e.g., 1 General, 1.1 Data Hierarchy Relationship Overview, etc.). If the rows are just header categories, can you confirm we can leave the response row null/blank?
- Yes, you may leave such rows as null/blank.
24. Do **Exhibit D** and **Exhibit F** require responses/deviations for each statement and a signature at the bottom of each section or, will just a signature acknowledging the requirements and providing any deviations (if any) suffice?
- One signature each at the end of Exhibit D and F will suffice. Any deviations in Functional Requirements should be documented using, at minimum, the included Exhibit E – Functional Requirements Response Form. Any deviations in Technical and Non-Technical Requirements may be documented in a format of your choosing.
25. In **Exhibit E – Functional Requirements Response Form**, there are pull downs for the first two columns. How much wording is required for the third column?
- As much as you deem is adequate. You are welcome to include embedded files in the third column's field.

1.2 Functional Requirements-related Questions

1.2.1 Users

26. The RFP lists the number of users on the existing application—should we assume a like number of users on the new system? Could you also provide additional information on exactly what functionality is desired for each user type?

- Yes, approximately 170 internal District users and approximately 800 non-District, external users.
- Broadly, external users will be primarily viewing, creating, submitting, and responding to documents. Internal users will be viewing, creating, submitting, responding to, transmitting, approving, and closing documents. Please refer to the functional requirements and other appendices for additional details. Ideally permissions for each document type and for each individual, organization, and project will be adjustable by District administrators.

27. On the pricing section, should the bidder anticipate external contractors to use the application? In general could you please provide additional information on the personas listed in the RFP and what functionality each requires? There are 57 users identified by user type but could you please provide additional information on the other 113 users (getting to the total of 170)?

- Yes, external contractors are an expected end-user of the new CMIS. External, non-EBMUD users are anticipated to total as much as 800 users, constantly in flux as they are assigned to ever changing awarded projects and leave as projects close.
- Breakdown of Internal Users
 - i. EBMUD Construction Groups
 - 2 Engineering Managers
 - 30 Engineers
 - 19 Inspectors
 - 3 Clerks
 - ii. EBMUD Design Groups
 - 94 Engineers also includes Drafters/Designers
 - iii. EBMUD Auxiliary Support Staff:
 - 1 Architect
 - 1 Supervising Plant Inspector
 - 6 Plant Inspectors
 - 5 Workplace Health and Safety Specialists
 - 1 Technical Training Analyst
 - 4 Community Affairs Representatives
 - 1 Materials Testing Supervisor

28. In order to more accurately quote the training, consulting and license needs, please provide a high-level breakout of the users' roles. For example, how many users work in each of the following areas: a) How many work with cost management? b) How many work in field management? c) How many are officials and require read-only and/or ability to approve business processes? d) Approximately how many 3rd parties (Architects, Contractors, Consultants)?

- a) 20 internal users, 150 external users
- b) 45 internal users, 150 external users
- c) 50 internal users, 200 external users
- d) approximately 10 internal users (varies), approximately 800 external users.

1.2.2 Data Migration

29. For data migration of all active construction projects, please explain what type of associated data will be migrated.

- Please refer to **Exhibit D – Functional Requirements, Requirement 1.6.3**. This is readily known information at this time.

30. Could you please provide additional background on the existing CMIS application? For example, how many projects are stored, how much history and what format the data is stored?

- As above.

31. What construction management and project collaboration will continue to be managed out of the current CMIS? What data needs to be exchanged with the solution?

- None. The current CMIS will be retired. Active construction projects in the current CMIS will need to be migrated into the new CMIS.

32. Does the district already work with Systems Integrators, Consultants, or have in-house IT resources who will participate in data conversion and migration?

- EBMUD does not currently have any system integrators or consultants who will participate in data conversion and migration. However, EBMUD does have various in-house IT resources to support the implementation of this project; please specify what resource expectation needs you have of EBMUD and the amount of time of each resource.

1.2.3 Interfaces & Integrations

33. How many systems and/or software applications would like the new Construction Management Information System to tie into? Additionally, what are the names of those systems/software's?

- At minimum, we anticipate integration with single sign on and the financial information system. All other integrations may be considered. Please itemize each as optional service. Please refer to **Exhibit F - Technical Requirements, Appendix A – District Systems & Software**.

34. Does EBMUD have any Capital Planning software in place?

- No. However, EBMUD anticipates some capital planning functionality from the current Financial Information System replacement project.

35. Does EBMUD anticipate integration with ESRI?

- EBMUD would consider integration with ESRI. Please itemize as an optional service.
36. Does your project data need to be accessible from your GIS system, either during, or after a project is complete?
- EBMUD would consider integration with our GIS system either for during or after construction project is complete. Please itemize as an optional service.
37. Could you please confirm EBMUD’s use of Innovyze and provide any integrations to the proposed application?
- EBMUD uses several Innovyze products, but none are widely implemented throughout the District. At this time, we do not envision how Innovyze products could integrate with CMIS. However, you are welcome to describe an Innovyze integration as an itemized, optional service.
38. Could you please provide additional information on integration with Autodesk software? Do you see a need to support Revit models? If so, how early in the project lifecycle do you see the need to include BIM models?
- EBMUD is increasingly using Revit models. However, notably at this time, the District lacks a centralized BIM solution. For the scope of this RFP, please first prioritize functionality noted in **Exhibit D – Functional Requirements**. You may include additional functionality as itemized and optional services.
39. Do you need your data to be easily extractable via open APIs into external softwares and BI tools for analysis and processing?
- EBMUD would consider having an API to extract data from your solution into external software and tools for analysis and processing. Please itemize as an optional service.

1.2.4 Miscellany Functional

40. **Functional Requirement 1.1.** Can you clarify what EBMUD means by Data Hierarchy Relationship?
- EBMUD is describing its data structure; how data types are grouped together and its relative parent-child record relationships. For example, we would like to generate reports at these levels.
41. **Functional Requirement 1.5.3.1.** What does a Workflow Performance report look like? What data does it contain?
- Workflow Performance Reports for a given document (e.g., RFI, Submittal, etc.) or document progression (e.g., Design Change → Change Order Request → Change Order) should provide a graphical and tabular breakdown showing each organization and/or users to which the document was assigned, the duration of assignment to each (i.e., “ball-in-court” duration), and other configurable data. Reports should contain adjustable “exceedance” thresholds to highlight durations that exceed user-defined criteria.

42. **Functional Requirement 1.7.4.3.** Can you clarify what key project statistics you are looking to review?

- Statistics for each project and for all projects would include minimum, maximum, mean, and median turnaround times (“days-in-review”) for all document types; change orders as percentage of original contract amount including breakdown by user-defined category (e.g. Design Errors or Omissions, Differing Site Conditions, etc.); total time extensions to date in calendar days and as a percentage of original contract duration; total risk items (user-created) and percentage of original contract amount; number of active users; percent complete to date (current approve progress payments vs. adjusted contract amount); and percent of adjusted contract time elapsed to date.

43. **Functional Requirement 2.4.8.** Could you send a copy of a sample Daily Extra Work Report?

- A sample Daily Extra Work Report is included. Please refer to Exhibit D, Appendix B - Examples of Documents available on our website under RFP documents.

44. **Functional Requirement 4.3.4.** What safety features are expected to be supported?

- Any functionality that promotes safety and/or supports workplace health and safety (e.g., documenting safety inspections, accident/incident tracking, injury reporting, hazardous material inventory, facilitate access to Material Safety Data Sheets).

45. Are you required to manage your projects assets after project completion?

- Yes. Typically, there will be a hand off to Operations & Maintenance business groups and their CMMS software.

46. Do you need the ability to leverage your model data for project management workflows?

- No preference.

47. Do 3D models, while retaining metadata such as install/maintenance, need to be viewable in your solution on both desktop and mobile?

- No preference. District Users may be able to view 3D models in respective native apps.

48. Do you need to be able to review real time clashes as design changes are made within your CM software?

- Any functionality promoting effective communication to design teams is desired.

1.3 Technical Requirements-related Questions

49. What are the existing financial and human resources systems currently in production?

- Financials is Oracle Financials. Human Resources systems is PeopleSoft (HCM) Release 8.8 SP1 with PeopleTools 8.43.14.

50. Do all the internal users of this system have Office 365?

- Yes, all District staff have Office 365, G3 License.

51. What tools are currently used for map, 2D plan, and 3D model views?

- Please refer to **Exhibit F - Technical Requirements, Appendix A – District Systems & Software**. Other tools include: AutoDesk Plant 3D and Bentley InRoads BIM.

52. **Technical Requirement 3.2.5** mentions third-party ETL and automated systems the District has. What are these systems?

- Vendor may specify whether they use or support any third-party ETL tools. Please note, many District backend systems are Oracle-based.

53. For system integrations, what types of data will need to be integrated? Are you able to provide examples of the types of field inputs or data elements that would need to be integrated?

- At minimum, EBMUD desires integration with SSO using ADFS and our financial information system via an API. Vendor may specify the minimum required fields the System needs from the District's financial system to support the requested Functional Requirements in this RFP. In general, the District would like to track the following financial-related information from construction contracts: bid amount, change orders, current contract amount, original number of days, extended number of days, current number of contract days, earnings to date, construction job number, liquidated damages, stop notices, retention amount, escrow amount, etc.

54. For any potential custom integration need, will you use internal system developers, third-party system integrators, or from the proposing vendor?

- No preference. You may state your assumptions and requests of internal District system developers, propose use of third-party system integrators, or include your optional services.

55. Is the expectation for files to be stored in a folder structure in a document storage component of the new system?

- No preference.

56. **Technical Requirement 8.1.3.** Given that the solution will be a SaaS offering hosted in the cloud and EBMUD will be paying subscription fees to use the solution, will escrow of source materials still be required since all intellectual property for Vendor's software will remain with the Vendor?

- Escrow would be required before the vendor goes out of business or otherwise ceases system support. If and when these triggering events actually occur, all materials needed for the District to continue operating and supporting the system on our own would then be released to us from escrow. Additional details will be negotiated in final contract.

1.4 Non-Functional Requirements-related Questions

1.4.1 Initial Onboard & Training

57. Can training be delivered virtually or is training staff required onsite?

- Yes, trainings may be delivered virtually.

58. Are there time constraints for each training session?

- No, initial onboarding training needs shall be dictated by the complexity of the new solution. However, we expect on-going training would be an abbreviated version of initial onboarding and be no more than 2 hours per session.

59. How many users per training session are being requested?

- For initial onboarding training, assume up to 150 users in total. Please propose an appropriate number of initial onboarding training sessions. For on-going training thereafter, assume up to 15 users per session.

60. How many users will need to be trained in Year 1 of the subscription? Year 2, 3, etc.? What is the total amount of users that would require training?

- Year 1 – assume up to 150 users total.
- Year 2 and beyond, please describe on-going training as optional services, assuming up to 4 sessions per year and up to 15 users per session.

61. Can we be provided a personnel role per training class outlined in the RFP?

- No, not at this time.

62. Is end-user training to be provided at once or over a period of time?

- Initial onboarding at once with optional recurring trainings each year. See notes above.

63. Would EBMUD consider a train-the-trainer approach for training? If the train-the-trainer approach is accepted, will EBMUD still require the ongoing training?

- The District prefers the vendor will provide the initial onboarding. Please consider the above notes and assumptions regarding on-going training.

64. Will training be limited to modules that fall under the proposed CMIS?

- Yes, training would be limited to the functional and technical requirements described in this RFP. You may include additional training for topics beyond this RFP as optional services.

65. Will training be required for supporting drafting/design software?

- No, training support for drafting/design software would be out of scope for this RFP. However, you may include additional training for topics beyond this RFP as optional services.

1.4.2 Implementation Plan

66. Is the implementation plan limited to implementing the new CMIS?

- Yes, please include an implementation plan that meets the functional and technical requirements described in this RFP. You may include describing your implementation plan of any additional optional services.

67. Will standards development be required as part of the implementation plan?

- No, the District will handle standards development.