

CITYWIDE CONSTRUCTION PROJECT MANAGEMENT
INFORMATION SYSTEM (CCPMIS)
LETTER OF INTENT

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CITY OF PHOENIX 246 S 22nd St, Phoenix, AZ 85034

Prospective Vendors:

The City of Phoenix (COP) is seeking proposals from a licensing, implementation and ongoing, long-term support expert for services of Oracle Primavera Unifier system (most current version as chosen by the City) for a Citywide Construction Project Management Information System (CCPMIS) that will provide portfolio, program, and project management across the organization for the entire lifecycle of Citywide construction projects to mitigate risk and ensure appropriate oversight.

This letter contains background about the current state, desired future state, and vendor requirements in the domains of applications, technical skills, and services required. Respondents that agree to all terms and conditions and exhibit credentials that demonstrate skills and experience with projects of similar size, scope and budget as detailed in the Scope of Work and Current Environment section of this letter will receive an invitation to participate in Round Two (2). The project will begin immediately upon award as deemed urgent with the City. Due to the time-sensitive nature of the CCPMIS Initiative, the selected vendor will be required to provide a performance bond to ensure that milestones are timely met.

Only firms authorized and certified to license and/or implement and provide long-term support of Unifier should respond to this Request for Letter of Interest (LOI); the City is not requesting proposals from staff placement or project management firms.

1. Background

A City audit identified the need for standardization and improvement of construction project management. Existing systems like PROMIS, CM13, and Primavera P6, do not adequately support the business needs; hence a new solution is required to provide City staff and contractors adequate tools to capture, plan, maintain and manage projects effectively from inception through the life of the asset(s), or until the asset(s) no longer exist. In certain cases, the lifecycle is perpetual.

The City's Aviation Department has successfully utilized Oracle's Primavera Unifier solution along with their designers, contractors, and stakeholders, to track and manage all construction projects regardless of funding source, and tenant improvement projects for the past thirteen years. The Streets Transportation and Water Services Departments desire to leverage the same technology platform to build and support a City-wide construction project management solution.

2. Scope of Work

The City of Phoenix is asking vendors to bid on two different scopes of work. **Vendors may bid on one or both SOWs.**

2.1. Scope A: Unifier Licenses and Cloud-based Platform*

The City will be utilizing a cloud-based solution for its Citywide Construction Project Management tool. This makes it easier for staff, employees, contractors, and vendors to utilize the new platform.

- 800 read and write Unifier licenses (possibly phased over time)
- Ongoing Customer Support as needed
- Cloud Storage and Maintenance

2.2. Scope B: Unifier Implementation*

The City is looking for an implementation expert of Oracle Primavera Unifier who can perform solution discovery by analyzing current setup and business processes and provide a recommendation for a sustainable architecture model to encompass different departments across the City. The City envisions the outcome of this scope of work through a phased approach which will be executed in the following manner:

2.2.1 Architecture Development (Phase One (1)): The vendor shall perform architectural development and conduct a technical assessment of current business processes.

- Understand the existing business processes of the Aviation department and identify gaps in mapping with Streets and Water business processes.
- Provide a list of options for a comprehensive implementation strategy to either integrate or consolidate the different departments and their systems using the Unifier solution.
- Provide Pros and Cons for the recommended implementation strategy with supported findings through discovery.

2.2.2 Implementation Strategy (Phase Two (2)): The vendor will implement the solution for Streets and Water based on the option developed during Phase One (1) and as approved.

2.2.2.1 Migration

The vendor will be responsible for migrating data from existing PROMIS II, CM13, P6, and EASi systems to Unifier.

- i. Migration of all historical records from EASi Records Management System (Over 1.15TB)
- ii. Migration of Water Services Oracle Contracts Management System (CM13) (Over 70GB)
- iii. Migration of all existing data from Water P6(Primavera) scheduling system (Over 40GB)
- iv. Migration of all existing data from PROMIS (100GB)
- v. Migration of all existing Design and Construction Procurement project tracking data (Over 1.5GB)

2.2.2.2 Integration

The system will integrate with the City's Financial system – SAP. Currently, it is installed on premise, with plans to move it to cloud-based. Vendor to detail application integration techniques for SAP. Integrating with SAP will utilize API tools which are part of the SAP toolkit.

There are several other data systems that will require a data-oriented (non-API) series of interfaces.

The City uses Azure API Management Platform (APIM) for all API integration. Additionally, the City uses Microsoft Active Directory (AD) for city employees and Azure B2C (for residents/non-employees) as their identity and authentication platform. (IAM).

Uses of these technologies are strongly mandated, if applicable.

2.2.3 Integration with Aviation’s Unifier System (Phase Three (3)): This is an **optional phase** depending on the recommendation selected from Phase One (1). This phase will be exercised if COP chooses to build an integration between the new Unifier and the existing system.

*Please treat these two (Scope A and Scope B) as separate, different scopes of work. Vendors may submit for one, or both components. However, all documentation, questions, and responses should be submitted as separate, different, and independent proposals (e.g., costs, resources, duration, etc.). Subsequently, the City reserves the right to award them separately and independently, if warranted.

3. Current Environment

3.1. Water Services Department

Capital Improvement Projects (CIP), ranging from \$10K - \$50M, were previously managed in Oracle Contract Management v.13.0 (CM13) and Primavera 7.00 (AKA P6).

- The CM13 system has approximately 280 user accounts, 2 active workflows, and 10,000 attached documents for approximately 687 projects.
- The Primavera P6 application has 5 user accounts and 3 active templates, with application data utilizing approximately 40GB of disk space for approximately 5,400 projects.
- The Water Services Department has two Engineering divisions that manage CIP projects: (i) Water and (ii) Wastewater. Division-level workflow processes are currently identical for both divisions. Currently, no outside construction contractors have access to WSD project management systems.

3.2. Street Transportation Department

Capital Improvement Projects, with an approximate \$150MM annual budget, are currently managed in PROMIS version II for Street Transportation Department (Central Records, Design and Construction Procurement, Vertical Project Management, and Horizontal Project Management, etc.).

PROMIS version II has approximately 500 user accounts, of which approximately 130 users are active. Database storage for data in the SQL Server system currently uses approximately 5GB of disk space, and approximately 62,500 documents are using approximately 100GB of disk space.

Currently, outside construction contractors have access to the Streets project management systems PROMIS II.

3.2.1. Horizontal and Vertical Project Management

The Horizontal Project Management Section provides CIP project management for the design and construction of City-funded projects within the Right-of-Way, such as sidewalks, roadways, and landscaping. Workflow processes for each section are significantly different.

The Vertical Project Management Section provides project management for the design and construction elements of city-owned properties and facility improvements outside of the Right-of-Way for departments other than Aviation and Water Services.

3.2.2. City Engineer's Office

The City Engineer's Office includes the following: Central Records, Environmental, Labor Compliance, Design and Construction Procurement, Small Business Enterprise, and Vertical Project Management, etc.

The City Engineer is responsible for overseeing the selection of architects, engineers, and contractors to execute the City's capital improvement program for all City departments through the Design and Construction Procurement section.

Contracts procured and executed by the Design and Construction Procurement section based on a request initiated outside the Design and Construction Procurement section are turned over to the requestor for contract management. Master contracts for on-call services and job orders are procured, executed, and managed by the Design and Construction Procurement section.

3.2.3. Procurement

Procurement initializes and manages all CIP contracts and currently utilizes PROMIS II, and SharePoint to track and store these contracts.

They also utilize SAP, EASi, and the City Clerk's webpage to retrieve recorded documents.

3.2.4. Central Records

Street Transportation's Central Records Division is responsible for maintaining all City of Phoenix's Capital Improvement Project records. This includes but is not limited to such items as Record Drawings, Full Construction Contracts, Payments, Notice to Proceed, and Final Acceptance Letters. In addition, Central Records has been chosen to maintain other important City of Phoenix miscellaneous documents. On a daily basis, the Central Records staff is archiving and researching documents for both internal and external customer requests.

EASi, a suite of Delphi Language applications, is owned and managed by Street Transportation Department under the Central Records Team. This application controls City of Phoenix project records from creation through disposition and ensures the efficient and economical management of information.

4. Project Objectives

With the goal of implementing an enterprise-level solution, Oracle Primavera Unifier, the City of Phoenix will in the following manner:

- Promote Transparency across the departments in terms of project activity, reporting, and analytics
- Provide consolidated data repository for construction project data
- Standardize and streamline business processes and tools used in construction projects across departments (Water, Aviation, and Streets)
- Design and produce a sustainable support model
- Provide visibility to the executive management team to view dashboards and associated key performance indicators (KPI's)
- Provide a comprehensive, robust, and intuitive project management tool that suits current and future needs
- Replace and consolidate current legacy systems that are at end of life

- Provide a certified system of records to store all existing and new documents related to CIP projects
- Provide the ability to track and manage multi-step document approval routing and notifications for contract approval flow sequences based on construction delivery method and cost.
- Enable Streets Transportation to migrate the EASi module application (record management system) to Unifier with add-on custom development to ease operational maintenance and enhancements.
- Meet Procurement's requirement to initialize and route CIP construction contracts from all City client departments, (Streets, Water, and Aviation being the majority share) through Unifier.
- Create a means for procurement to submit electronic Project Initiation Forms (PIF) for routing and approvals within Unifier to replace InfoPath in SharePoint Online for project initiation workflow.

5. LOI Procurement Process

The City of Phoenix is using the Agile Procurement Process initiated by this LOI. The Agile Process consists of Two (2) Rounds.

Round One (1) includes the evaluation of proposals received from this LOI. Round Two (2) consists of an evaluation of proposal presentations during an interview process. Only those vendors demonstrating requisite experience and agreement to the City's standard terms and conditions will receive an invitation to present their solution to the City of Phoenix CCPMIS evaluation panel.

If selected, the proposer will receive an invitation to participate in Round Two (2). Round Two (2) proposals should include milestone based cost estimates, rough design architectures and the proposed methodology which will be demonstrated during an interview with the City of Phoenix CCPMIS evaluation panel. More detailed specifications, evaluation criteria, and milestone timeline requirements for presentations will be included in the Round Two (2) Invitations.

There will be a mandatory pre-proposal conference for this LOI to review and highlight important information and answer questions received. There will also be an opportunity to ask follow-up questions.

All questions related to this Agile procurement should be directed via email to the Procurement Officer, Genie Usher at genie.usher@phoenix.gov and must be received 24-hours before the pre-proposal conference indicated in the Schedule of Events below. Questions received by the deadline will be answered in the form of an addendum posted to the City's solicitation page. The City will not answer questions received after the deadline.

No contact initiated by Offerors regarding this Letter of Interest will be allowed with members of City's staff or City Council beginning on the date of this LOI until after City Council awards the contract. Failure to comply will result in disqualification. All questions concerning, or issues related to, this agile procurement and/or project must be presented in writing to the Procurement officer.

5.1. Schedule of Events

Event	Date *
LOI Released	Wednesday, April 28, 2021
Deadline to Submit Round One Questions	Monday, May 3, 2021
Mandatory Pre-proposal Meeting Q&A Round One	Tuesday, May 4, 2021
Round One Q & A Posted to City Website	Wednesday, May 5, 2021
Round One Proposals Due	Wednesday, May 12, 2021
Invitations to Round Two Released	Thursday May 13, 2021
Deadline to Submit Round Two Questions	Monday, May 17, 2021
Mandatory Pre-proposal Meeting Q&A Round Two	Tuesday, May 18, 2021
Round Two Q & A Posted to City Website	Wednesday, May 19, 2021
Round Two Proposals Due	Friday, May 28, 2021
Memorial Day	Monday, May 31, 2021
Round Two Interviews	Tuesday, June 1 & Wednesday, June 2, 2021
Recommendation of Award Posted on City Website	Friday June 4, 2021
Vendor Selected to Provide Proof of Bond	Friday, June 11, 2021
City Council Agenda Date	Wednesday, June 16, 2021
Contract Effective	July/August timeframe

**Dates are subject to change. Procurement Officer will post any changes to the City's Solicitation website.*

6. LOI Proposal Requirements

The City will only consider proposals from vendors that can illustrate and verify high levels of competence and demonstrated expertise in Oracle Primavera Unifier implementations and integrations, and ability to provide at least 5-years of ongoing support.

To be considered for subsequent invitation Round Two (2) please complete the CCPMIS Application attached as Appendix A with the following Section Headers:

1. Intention to Bid
2. Vendor Qualifications and Experience
3. Vendor Bond – acceptance of this condition
4. Pricing (hourly rates)
5. References
6. Signed acceptance of Legal Requirements (Appendix B)
7. Signed acceptance of City's Conflict of Interest & Solicitation Transparency Disclosure Form (Appendix C)

Vendors who meet the qualifications and agree to the terms and conditions will pass Round 1 of the procurement process. Those invited to Round 2 and can expect a little over 2 weeks to develop and prepare a presentation of the recommended application to key end-user stakeholders. Selected vendors will need to be ready to present a rough design solution with a suggested architectural approach and methodology. They will also be expected to present milestone based billing schedule. (More details of expectations will be provided in the Round Two invitation.) The CCPMIS Evaluation Panel will then select an awardee whose experience and qualifications best meet the City's needs.

6.1 Vendor Qualifications and Experience

The city is looking for Unifier Qualified Implementation Vendors that can meet the following criterion.

- Three (3) or more prior large (similar in size and scope to COP proposed project) Unifier implementations within the construction industry
- Professional qualifications and experience of vendor staff with a minimum of four (4) years of relevant experience and demonstrated success in providing the expertise in the subject matter necessary to complete the services requested
- Experience with implementation and coordination with public sector requirements
- Demonstrates a clear understanding of Unifier and correlating relationship with construction industry practices
- Experience in training employees to train construction management staff in the use of the Unifier product for two or more projects
- Ability to support large public sector installations

6.2 Vendor Bond

In addition to the Required Qualifications and Experience, the vendor shall guarantee the successful, timely completion of those aspects of the project over which it has control with a \$1,000,000 performance bond.

6.3 Pricing

This Section refers to the Pricing Worksheet in Appendix A for completing cost details. A pricing structure is required and must indicate these key stakeholders of the implementation team and their corresponding loaded hourly rates. Loaded hourly rates shall include Overhead and Profit which shall be identified on the chart. For evaluation purposes only, the classifications/roles below will be allowed.

6.4 References

This section will be evaluated on the following guidelines:

A minimum of three (3) references **MUST** be provided. References provided must be current, verifiable, and willing to attest to the vendor's commitment and ability to perform the specified requirements of this project.

References provided should be of similar scope and size as the COP – public entity, with approx. 1000 users, cloud-based, and integration with other systems.

6.5 Acceptance of Terms and Conditions

Vendors must accept all Terms and Conditions listed in Appendix B to be considered for the CCPMIS Project.

7. SUBMITTAL INSTRUCTIONS

Responses to this LOI shall be formatted and organized in the following order for consistency and easy screening:

Please submit one original and one electronic copy (portable thumb drive) of the Submittal Section and all other required documentation.

Those proposal/s that meet the qualifications and agree to terms and conditions will be invited for the Round Two (2) onsite interview. Details for the interview, if necessary, will be disclosed once the proposal/s are selected. The selected vendor will then be informed.

Please submit only the Submittal Section, do not submit a copy of the entire LOI document. This offer will remain in effect for 60 calendar days from the bid opening date and is irrevocable unless it is in the City's best interest to do so.

8. OFFER SUBMITTAL FORMAT

The written offer must be signed by an individual authorized to bind Offeror and should provide the name, title, e-mail address and telephone number of individuals with authority to contractually bind the company and who may be contacted during the evaluation period. Offers should be:

- Typewritten for ease of evaluation;
- Submitted in a binder, preferably using double-sided copying and at least 30% post-consumer content paper;
- Submitted via electronic copy;
- Signed by an authorized representative of the Offeror;
- Submitted with contact information for the individual(s) authorized to negotiate with the City;
- Submitted with a table of contents and tabbed per the following major sections:
 1. Intention to Bid
 2. Vendor Qualifications and Experience
 3. Vendor Bond – acceptance of this condition
 4. Pricing (hourly rates)
 5. References
 6. Signed acceptance of Legal Requirements (Appendix B)
 7. Signed acceptance of City's Conflict of Interest & Solicitation Transparency Disclosure Form (Appendix C)

9. Funding

The City has allocated \$1,500,000 for the development and implementation of this project. Subject to City Council approval, ongoing costs would be included in the City's annual budget.

Response Requested

Please respond with your level of interest to bid on this project by completing the form located in Attachment A. Please send your completed response to genie.usher@phoenix.gov before 11:59 PM Mountain Standard Time on Wednesday, May 12, 2021.

Thank you,
Genie Usher
City of Phoenix Procurement Division
602-261-8950

APPENDIX A
VENDOR APPLICATION

Due Friday, May 12, 2021.

Intention to Bid

Scope A: Unifier Licenses and cloud-based platform

Scope B: Unifier Implementation

**Please treat these as two separate, different scopes of work. Vendors may submit for one, or both components. However, all documentation, questions, and responses should consider them as separate, different, and independent submissions (e.g., costs, resources, duration, etc.). Correspondingly, the City reserves all rights to award them separately and independently, if warranted.*

Vendor Qualifications and Experience

1. Provide vendor Organizational Chart
2. List vendor experience with at least three (3) or more prior large (like size and scope of COP proposed project) Unifier implementations within the construction industry
3. Describe experience with implementation and coordination with public sector requirements of similar scope, size, and budget as the City of Phoenix.
4. Detail experience in training construction management staff in the use of the Unifier product for two or more projects
5. Provide professional qualifications and experience of vendor staff with a minimum of four (4) years of relevant experience and demonstrated success in providing the expertise in the subject matter necessary to complete the services requested. (Description of Project team organization; names and resumes of team members) Must provide proof of Unifier Certifications.
6. Identify any parts of the services required under this resulting contract that will be subcontracted
7. Need to include detailed criteria on the vendor's ability to support this installation over the long-term – use 5 years to provide costs. Nature of staff, a method to provide support, SLA, RACI, annual support costs, etc.

Vendor Bond

In addition to the Required Functionalities and Services, the vendor shall guarantee the successful, timely completion of those aspects of the project over which it has control with a \$1,000,000 performance bond,

Acceptance of vendor bond condition

If selected agree to provide documentation of bond by Friday, June 11, 2021.

Pricing

Scope A: Please provide tiered license pricing, include any support or maintenance costs as well.

Scope B: Please complete the Classification and Rate Structure Form Below

Classification and Rate Structure <i>*please add roles if necessary</i>		Overhead - ____%
		Profit - ____%
Classification/Role	Loaded Hourly Rate	
Project Management and Implementation Team		
Program Manager		
Project Manager		
Delivery Manager		
Technical Lead		
Process Consultant		
Business Analyst		
Subject Matter Experts (SMEs)		
Implementation Coordinator		
Workflow Specialist		
Integration & Data Migration Consultant		
Software Testers		
Report Writer		
Office administrative staff		
Training		
Team Trainer (train-the-trainer and super users)		
Support Post Implementation		
5-year ongoing annual maintenance cost (including support) please itemize		

References

This section will be evaluated on the following guideline:

Preferably, references provided should be of similar scope and size as the COP – public entity, with approx. 1000 users, cloud-based, and integration with other systems.

A minimum of three (3) references **MUST** be provided.

References provided must be current, verifiable, and willing to attest to the vendor’s commitment and ability to perform the specified requirements of this project.

- Organization /Client name/address
- Name of the contact person
- Email address and telephone number for contact
- A detailed description of vendor services provided to the client
- Professional relationship with Organization/client
- Whether the organization/client would recommend the vendor

Acceptance of Legal Requirements

Signed acceptance of Legal Requirements (Appendix B)

Acceptance of City’s Conflict of Interest & Solicitation Transparency Disclosure Form

Signed acceptance of City’s Conflict of Interest & Solicitation Transparency Disclosure Form (Appendix C)

Please send this completed response and any attachments to genie.usher@phoenix.gov;

*Send binder copy of response to Genie Usher,
City of Phoenix, Streets Transportation Department,
246 S 22nd St, Phoenix, AZ 85034*

before 11:59 PM Mountain Standard Time on Wednesday, May 12, 2021.