May 26, 2017

Dear Prospective Proposer:

The Village of Addison is soliciting proposals for the purpose of procuring a Computerized Maintenance Management System (CMMS)/Enterprise Asset Management (EAM) software solution to meet the specific computing and customer service needs of the Village.

Title: **Computerized Maintenance Management System (CMMS)/Enterprise Asset Management (EAM)**

RFP: **#17-5-5**

Proposals Due: **June 21, 2017 at 11:30 AM CST,** Village of Addison c/o Baecore Group, Purchasing Department, 1 Friendship Plaza, Addison, Illinois 60101

Please note the following requirements:

➢ Proposal response including the requirements described in the RFP *Proposal Submittal Requirements* and *Pricing Submittal Requirements* sections
➢ Signed Proposal Form
➢ Proposal Cover Sheet
➢ Vendor Contact Form
➢ Contractor's Drug-Free Workplace Certification
➢ Affidavit of Compliance

We sincerely hope that you take the time to submit. If you choose not to, we ask that you please fill out the enclosed RFP Response Survey form.

If you need additional information please contact me at 877-223-2673 ext. 1486 or email to smith@baecore.com.

Sincerely,

Mary Smith
On the Behalf Of the Village of Addison
Baecore Group, Inc
smith@baecore.com

Village of Addison

REQUEST FOR PROPOSAL

Computerized Maintenance Management System
(CMMS)/Enterprise Asset Management (EAM)

RFP #17-5-5 Work Orders EAM Software

Proposal Due: June 21, 2017 @11:30 AM

Village of Addison
Purchasing Department
1 Friendship Plaza
Addison, Illinois 60101
Attn: Mary Smith, RFP Manager

CONTENTS

Village of Addison

A Computerized Maintenance Management System (CMMS)/Enterprise Asset Management (EAM)

REQUEST FOR PROPOSAL #17-5-5

RFP OVERVIEW

The Village of Addison (hereinafter Village) is requesting proposals from qualified firms (hereinafter Proposers) to provide a comprehensive solution with capability to support end-to-end workflow from the submission of service requests by citizens, automated routing of service requests, conversion of service requests to a work orders EAM solution with capabilities of asset management, job costing, capital project planning and asset condition rating. The solution that will best fulfill the needs of the Village will provide for infrastructure data collection and GIS-centric work order process that will leverage the Village's ESRI compliant GIS environment.

In addition to the software, the Village requires Proposer to provide professional services that will ensure a timely and successful implementation and knowledge transfer of setup and maintenance requirements to the Village staff. Professional services will need to include process review and improvement recommendation and implementation based on public sector best practices, current customer service requirements and Village ordinances/policies.

The Village is not looking to customize the software, however, Addison is interested in a software solution that is highly configurable by Village staff to support the current and ongoing needs. The Village is in the process of selecting a new utility billing system as part of an ERP selection. The selected EAM system will need to integrate with the utility billing system to allow the service orders created in the ERP utility billing module to flow into the EAM system.

BACKGROUND

The Village of Addison Public Works Department consists of multiple divisions including:

- Environmental Services Division – responsible for waste water treatment and waste water management
- Street Division – responsible for Village street, traffic sign maintenance, pavement stripping and snow plowing

- Water Division – responsible for operation and maintenance of the Village's water system, including storage, pumping, treatment and distribution
- Electrical and Forestry Division – responsible for street lighting, tree trimming and planting

The Village of Addison Public Works Department provides these services for approximately 36,942 residents. The Village spans 9.98 square miles with tens of thousands of assets. These include approximately 96 miles of street, 180 miles of water mains, 120 miles of sanitary sewer, 73 miles of storm sewer, and 2 wastewater treatment facilities.

Currently the Village does not have a work order system that provides the required citizen request support, asset management, reporting, preventative maintenance, and GIS-centric asset inventory system tied to the associated work orders. The Village relies on spreadsheets and paper processes for their work order management. Presently, there is a strong need for a comprehensive service/work order system with end-to-end support from citizen requests through work orders, job costing, asset management and tracking.

The Village of Addison and the Public Works Department is looking for a solution that will simplify communication with citizens as well as improve efficiencies in providing service, tracking and management of the Village's assets including location, preventative/scheduled maintenance, condition assessment, etc. The desired workflow includes the capability to allow citizens to enter requests through a mobile option. The request would be automatically routed to the proper department based on the information entered by the citizen. For the more complex citizen requests, a work order would be created from the service request and routed to the proper Public Works Division(s) based on the service type. Additionally, the system would have the ability to route a single work order to multiple divisions as well as a single work order producing multiple "child" work orders.

The Village recognizes that it is extremely important to know where assets are, when they are being maintained and associated costs. Therefore, the Village is seeking to implement a work order system with a software solution that will provide the ability to track and manage infrastructure service requests, repair work orders, asset inspections, infrastructure lifecycles, and citizen reported concerns. Another objective of this project is increased transparency and improved communication for our citizens, providing them with the ability to look up and see the status of their requests in an easy to use online and/or mobile solution.

Additional information about the Village is available at www.addisonadvantage.org.

RFP TIMELINE

Below outline the key dates for the RFP process. The Village reserves the right, at its sole discretion, to adjust this schedule as necessary. Notification of any adjustment to the timeline will be provided to Proposers who have expressed their intent to respond to the RFP by sending email as indicated below in the Intent to Respond section.

RFP EVENT	DATE/TIME
Issuance of RFP	May 24, 2017
Optional Vendor Conference	June 2, 2017
Deadline for Questions	June 14, 2017
Deadline for Proposal Submission—11:30 AM	June 21, 2017
Village to Notify Proposers for Demonstrations	June 28, 2017
Initial Demonstrations	July 14,2017
Finalist(s) Proof of Capabilities Demonstrations	Aug 7 – 18, 2017
Contract Negotiations with Top Candidate Begins	Sept 2017
Finalize Contract Negotiations or #2 Proposer Contract Negotiations Started	October 1, 2017

ADDITIONAL INFORMATION

Intent to Respond to RFP:

All Proposers intending to respond to this RFP are requested to indicate so by sending an email of your intent, company name and your contact information with the subject line of "VOA RFP 17-5-5 Work Orders EAM Software" to Mary Smith at smith@baecore.com on or before Wednesday, June 7, 2017.

QUESTIONS RELATED TO THIS RFP

All questions and communications related to this RFP should be submitted to Mary Smith at smith@baecore.com in writing. The **email subject should contain "VOA RFP 17-5-5 Work Orders EAM Software"**. All questions will be answered via addendum(s). All questions need to be received no later than June, 14, 2017 by 12:00 PM.

PROJECT OBJECTIVES

The scope of this project is comprehensive with multiple objectives. The Village wants to improve efficiency and communication within the Public Works Departments through the use of automation and mobile functionality to track asset information, preventative maintenance, inspection, and work orders information within a software solution. With the implementation of a work orders solution it is the expectation that the Village will be able to establish, manage and trend KPI's as well as condition ratings of all assets. Tracking assets and relating them to service work and the GIS database will provide the improved reporting and capital planning desired. The solution implemented will bring to the Village the ability to track projects and the associated costs. Additionally, the Village wants to improve efficiency for receiving and taking action on customer requests.

SOFTWARE SELECTION

The proposed solution should be a comprehensive system that support easy access to data about each asset's installation, operations, maintenance, and removal. The solution should be user friendly, secure, web-based geospatial application including the following key components.

- Asset Management –The asset management needs to be robust to track their location, service history, conditions, preventive maintenance and maintenance cost of all assets. The ideal solution will allow the users with the correct security access to update asset information "on the fly" in the field.

- Dashboards – The solution should have a robust dashboard that allows for customization based on the user and their needs. The dashboard should provide ease of access to information, reporting, and issues the Village indicates they need to monitor.

- Report/Analysis – The Village is looking for a solution that has a robust reporting solution allowing for export to PDF, Excel, CSV, and Word. Such a solution would have a library of standard reports available to the Village staff. In addition, the ability to build additional or custom reports would be able to be completed by the Public Works end user, not requiring IT, computer programming or database expertise.

- Document Management tools – Robust tools for retrieval, and categorization of documents related to each asset.

- Workflow – Maximizing automation and improving service response times and elimination of duplicate work effort.

- Multi-layered Security – The security needs to be technically current and flexible in allowing a number of roles internal as well as external to the Village. The ability to efficiently administer users and their access to specific projects and asset attributes as staff, management and others is a must.

- Mobility – Much of the work is completed by the Public Works team in the field. A robust, easy to use, user friendly interface is a must for the mobile solution. The Village prefers mobile solutions that do not restrict their options of devices, tablets, smartphones, etc.

- GIS-- Maps and GIS layers as a core part of the solution is essential for the Village. With the number of assets, spread throughout the Village, tracking the location of these assets is an essential component of the proposed asset inventory, maintenance planning, and maintenance solution. Merging data from the GIS into the asset siting and planning process is an essential part of the solution. The data and presentation capabilities from the GIS will make it possible to create maps and reports that are filtered and sorted for management, and present the information in meaningful, easily understood formats.

- Project Tracking – The solution proposed needs to extend beyond individual work order management providing for the ability to track projects and the associated costs.

- Citizen Requests – The proposed solution should provide online and/or mobile capability for citizens to submit requests. These requests should automatically route to the proper department based on the request type. For complex requests, a work order would be created from the service request and routed to the proper Public Works Division(s) based on the service type.

SCOPE OF SERVICES

In its responses, the Proposer should recommend a solution that encompasses all aspects of the project scope described in this *Project Objectives* section. This includes services such as implementation, custom reporting, process consulting, training, testing, go live support, conversion assistance, etc., to complete the implementation. Proposers should include in their response, recommendations for services that would be necessary or beneficial to support the Village in successfully implementing the proposed solution and achieve its stated objectives.

SOLUTION INITIAL EXPECTATIONS

1) The Proposed Solution (hereinafter the "Solution") should be a stable, scalable solution that will replace other processes and/or systems currently in use (listed in *Project Objectives; Software Selection* section of this RFP).

2) The Solution should be accessible throughout the entire Village from any location or remote site and be web accessible.

3) The internal and external customer interface and functionality should be user-friendly.

4) The Solution will enable easy reporting of data in both standard out-of-the-box reports and custom developed reports.

5) The Solution will be flexible and simple to adapt, expand or change to meet specific department's information needs.

6) The Solution should provide easy access to information with a self-service, searchable format.

7) The Solution will maximize the efficiency of business operations through automated workflows, notifications and document availability.

8) The Solution will be flexible to customize the programs to meet the Village's business processes.

9) The Solution will have map display capability to enable viewing the locations of assets, work orders, etc., through a map interface.

PROPOSAL SUBMITTAL REQUIREMENTS

Responses are due on June 21, 2017 at 11:30 am central time. Submit your proposal, one (1) original hard copy, two (2) additional hard copies and two (2) electronic copies each on a USB drive to:

Attn: Mary Smith
C/O Purchasing Department
Village of Addison
1 Friendship Plaza
Addison, Illinois 60101

Your response must be received by the date and time specified. On the outside of your proposal packet please place the Sealed Proposal Form located in the attachments.

In order to be considered for this proposal, all vendors must submit a proposal response that includes the sections outlined below. Each section is described in detail in the paragraphs that follow.

Section 1:   Company Background
Section 2:   Application Software and SaaS Infrastructure
              2A – Software and Requirements
              2B – Hosting Environment
Section 3:   Hardware Requirements
Section 4:   Software Technology Roadmap
Section 5:   Software Partner(s)
              5A – Implementation Philosophy and Project Plan
              5B – Experience and References
Section 6:   Strategic Partnerships
Section 7:   Implementation Philosophy and Project Plan
Section 8:   Maintenance, Support and Agreements
Section 9:   Project Team
Section 10:   Experience and References

In addition, the following must be completed:
- Request for Proposal Form
- Proposal Cover sheet
- Vendor Contact Information form
- Contractor's Drug-Free Workplace Certification
- Affidavit of Compliance
- Functional Requirements Matrix

SECTION 1 – COMPANY BACKGROUND

Provide an overview of your company's background, including the following information:
- Proposer's legal name and corporate structure
- Location of headquarters, technical support and field offices
- Proposer's primary contact (including name, address, phone and email)
- Number of years in business and providing the proposed solution
- Number of years providing CMMS/EAM software and/or implementation services to the public sector
- Proof of financial stability
- Identify any pending litigation against the company

SECTION 2 – APPLICATION SOFTWARE AND SAAS INFRASTRUCTURE

The Proposer should provide detailed information related to the software solution and hosting environment.

SECTION 2A – SOFTWARE AND REQUIREMENTS

Provide detailed information related to the proposed software solution and any hardware that is required to support the software including the following:

- Describe the overall proposed technology solution
- List and describe each product available within the proposed solution
- List and describe functionality within each product
- Identify the reporting tools associated with the solution (specify programming language if applicable)
- Platforms supported
- Optimal and minimum desktop (client) requirements
- Is content delivered through a web browser (which browsers are supported?)
- Provide information on the system functionality, completing the Functional Requirement document. (Attachment A – editable word document)

SECTION 2B – HOSTING ENVIRONMENT

Provide a detailed description of the hosting environment for the software solution that is being proposed including:

- Identify the owner of the data facility
- Identify who manages the data facility employees/contractors, etc.,
- How long has the proposed data center been up and operating
- How many clients are being hosted by vendor
- How many clients are hosted in the proposed data center
- Will the Village's data be hosted on a separate system or together with other clients
- Identify the disaster recover site or sites

SECTION 3 – HARDWARE REQUIREMENTS

In your response, provide any and all network specifications required to securely access the SaaS environment and utilize the software proposed. In addition, provide all of the hardware, software, and operating systems, and/or client browser requirements to support sufficient capacity to provide reasonable response time for the Village users for all online transactions, ad hoc queries and reporting.

SECTION 4 – SOFTWARE TECHNOLOGY ROADMAP

Provide a description of the planned upgrades for the next 24 months. In addition, provide a description of your firm's philosophy as to how upgrades are identified, developed and implemented.

SECTION 5 – THIRD PARTY/PARTNERS

In the proposal disclose all third parties or partners that will provide any implementation services, support, hosting services, backup disaster recovery, or any other product, service or software that is included in the Proposed products and services.

For each third party or partner, clearly describe its involvement. In addition, describe the third party/partner's experience in the public sector, including implementations similar to the scope and complexity of this project. Also state the length of time the Proposer and Third Party or Partner have had such a relationship (providing the same or similar products/services in the public sector).

SECTION 6 – STRATEGIC PARTNERSHIPS

Provide a list of software partners that you have integrated with your software.

If you are recommending any third party products as part of the proposal solution, the following information should be provided for each third party product being proposed:

- Partner name
- Length of time this partner has worked with you in this capacity
- Indicate the number of integrations you have previously performed with this partner.
- Identify if one-way or two-way integration was performed for each client.

SECTION 7 – IMPLEMENTATION PHILOSOPHY AND PROJECT PLAN

The proposer will prepare a detailed description clearly explaining the proposed software solution and services in relation to the Scope of Work detailed above. This section will confirm the Proposer's understanding of this RFP and will address all the requirements specified within the RFP. This section will also clarify how the proposer will support the Village in managing the **software implementation** project.

This should include respective **roles and responsibilities** as the Proposer's recommended approach, the Implementation Methodology, proposed project phases if any and the project management.

With the implementation of a new system, the Village would like to make sure the processes within the department are efficiently aligned with the capabilities of the software, expectations of citizen service and comprehensive utilization of the system capabilities thereby achieving the best ROI. As part of the proposal provide detail of the services you feel will best fit the Village to align the software implementation with the business processes of the department.

As any part of a new system training is essential. Please provide the training approach recommended. The Village is looking for a solution that ensures the end users are trained to use the system appropriately to align with the software and process changes.

Additionally, the proposer will need to include the training or knowledge transfer process for the administration of the system.

It is important to the Village the Proposer selected has a comprehensive support solution. And to that end, the Village would like to understand the proposers **support during the implementation, cutover and initial stabilization period**.

Provide a detailed sample project plan, which indicates your proposed services and your team's understanding of the project scope. The project plan should document a logical technical approach to the project scope of work and objectives. The sample project plan should include the following:

- A detail of major tasks and subtasks, the work to be conducted in each, the roles and responsibilities performed by the Proposer and those performed by the Village.
- Results and deliverables expected from each major task.
- Identify appropriate assumptions and considerations that could impact the scope and timeline for completing each task.
- Identify the industry "best practices" used in your intended analysis.
- Develop an anticipated project timeline based upon the proposed project plan.

As part of your response, provide information about the following deliverables and services:

- Project status reporting and status meetings (including frequency and sample reports)
- Approach to identification of gaps where software cannot be configured to meet desired business process and suggested resolutions
- Preparation and support for the following:
    - Pre Go Live (go live preparation)
    - Go Live
    - Post Go Live
- Describe your end user training services including:
    - End user training
    - Training materials
    - Training plan/method (i.e., train-the-trainer, end user training, etc.)

SECTION 8 – MAINTENANCE, SUPPORT & AGREEMENTS

Provide a description of your firm's philosophy regarding ongoing maintenance, release/ upgrade and support services. Explain the Proposer's backup and disaster recovery procedures.

Provide a detailed explanation of your support structure during the implementation and post implementation. This description should include your processes for:

- How to raise a support issue

- Tracking of support issues

- Reporting of support issues

- Escalation procedures

- 1st, 2nd 3rd level support issues

- Service levels for response (based on criticality of issue)

- Service levels for resolution (based on criticality of issue)

- Ongoing customer relationship management

- Maintenance process (including inclusions, exclusions, frequency, etc.)

The Proposer MUST provide their proposed warranties, license and maintenance agreements and contract terms and conditions as part of the proposal response for all components of the proposed solution.

SECTION 9 – PROJECT TEAM

Provide an organizational chart that identifies the executive team members with name(s), title and role. Provide the proposed Project Manager's name for all project phases with a description of their experience and/or resume.

SECTION 10 – EXPERIENCE AND REFERENCES

Provide a list of all public sector clients in the United States that currently use the software that is being proposed.

Provide at least three (3) references of municipal clients for whom your firm has provided the software and services of a similar magnitude and scope as the Village's project. The references must be fully implemented and "live". Please include:

- Municipality name and contact information (name, title, address, phone, email)
- Reference population
- Number of users
- Reference annual operating budget
- Software program/version/modules implemented
- Summary of project scope
- Award date
- Go live date
- Year one project costs (including implementation, project management, conversions, integrations, etc.)
- Year two project costs (including implementation, project management, conversions, integrations, etc.)

PRICING SUBMITTAL REQUIREMENTS

Provide a detailed description of the fees associated with the proposed software and service offerings. If there are options for on-site or SAAS hosting, provide pricing for available options. Pricing will need to include

- ➤ Full-scale implementation
- ➤ Requirements/Design
- ➤ Project Management
- ➤ Implementation

- ➤ Process Review, Improvement, Implementation
- ➤ System implementation and Configurations
- ➤ Custom Reporting
- ➤ End-user Training
- ➤ Administrator Training
- ➤ Anticipated Travel
- ➤ Software installation and hardware setup.
- ➤ One-time costs such as software or hardware purchases
- ➤ Software Licensing
- ➤ Data Conversion
- ➤ 3rd party products if any
- ➤ Partner services, if proposed
- ➤ Backup/Recovery Services
- ➤ Maintenance

Incomplete pricing or proposals without the outlined services requested may be eliminated.

SOFTWARE AND SERVICES PRICING

The proposer is to identify in their proposal which licenses are needed to support the proposed design. The proposal should include a description of what software is proposed and what level of customization and development is included in these costs. In addition, the proposers must specifically identify in the cost proposal both the short and long term costs for the software which should include:

INITIAL INVESTMENT
- ➤ Purchase of initial software licenses
- ➤ Cost to develop any supplemental programs needed for system integration
- ➤ Cost of software maintenance and support for the duration of the project
- ➤ Hardware purchases
- ➤ Software installations
- ➤ Hardware installation
- ➤ Implementation Services
- ➤ In addition to the cost information, supplemental hourly rates for the project team members should be provided
- ➤ Custom Reporting
- ➤ Cost of software maintenance and support for the duration of the project
- ➤ End-user training
- ➤ Administrator and Super-User training

- ➢ Anticipated travel
- ➢ Data Conversion
- ➢ Reporting Software
- ➢ 3rd party product required for the new system
- ➢ Partner services, if proposed

ONGOING/RECURRING COSTS
- ➢ Backup/recovery services
- ➢ Maintenance (updates)
- ➢ Support

The proposer should also identify any future software maintenance and support costs for the 5 years following the <u>completion</u> of the implementation effort.

HARDWARE PRICING

The proposer is to identify in their proposal any additional hardware that the Village will need to obtain in order to utilize the proposed software solution, including for any third party software.

DEMONSTRATION REQUIREMENTS

INITIAL DEMONSTRATION

Of those that submitted proposals, the Village of Addison will select Proposers to perform an initial demonstration to provide the Village personnel with an understanding of the proposed solution's functionality and its ability to meet the specified requirements in this Request for Proposal.

Proposers that will be completing initial demonstrations will receive demonstration scripts outlining the functionality to be demonstrated. These scripts will be provided in advance of the demonstration to allow the Proposer time to prepare for the demonstration.

PROOF OF CAPABILITIES DEMONSTRATION

Proposal finalists will be required to perform a proof-of-capabilities (POC) demonstration to allow staff to fully understand the proposed solution. We anticipate each demonstration to last 1 day (6-8 hours).

The POC is not intended to be a generic demonstration of the application, but rather a demonstration of specific product functionality deemed most critical to the Village using scenarios provided by the Village. Proposers must be prepared to invest the time and resources in the POC to be successful in this procurement.

Scripts will be sent to each proposer detailing the demonstration requirement. Scripts will be sent with as much lead time as possible to prepare for POC demonstrations, so that they are more effective.

EVALUATION PROCESS

The Village will review all proposals. The solution will be selected based on a **two-phase evaluation process**.

Phase 1, Proposal Evaluation Phase, will serve to short-list the participating Proposers to enter into the next phase.

Phase 2, Two Stage Vendor Demonstrations consisting of initial on-site demonstrations followed by the extended proof of concept demonstration.

- The short-listed proposer's solution will be scheduled to provide formal demonstrations to the Village's Project Team and end users.

- The demonstrations will include a visual presentation of the proposed software and question and answer opportunities.

- The demonstrations are to include the functions outlined by the Village in the "demonstration checklist" Provided to vendors invited to demonstrate. The checklist will correspond to the Village staff scoring sheets.

During the selection process the RFP Manager (Mary Smith) may conduct discussions with any Proposer who submits an acceptable or potentially acceptable proposal. Proposers shall be accorded fair and equal treatment with respect to any opportunity for discussion and revision of proposals.

The Village of Addison will evaluate the proposals for both phases of the demonstration evaluation process, based on, but not limited to the following criteria:

- Overall Software Solutions (15%)
- Quality, clarity, and responsiveness of proposal (10%)
- Village Staff's assessment of the ability of the proposer's proposed software

and services to meet the Village's needs (15%)

- Completeness of solution and services proposed (10%)
- Experience and qualifications of Software and Services as proposed (5%)
- Ability to Demonstrate Specific Functionality Requested (Proof of Capabilities Demonstration) (15%)
- Anticipated value and price (20%)
- Perceived risk of the proposal (5%)
- References provided (5%)

The Village intends to select the best overall solution to meet its needs through these processes. The Village will then express its intent to enter into contract negotiations with the selected Proposer. Should negotiations fall short of expectations the Village will proceed to their alternative Vendor selected.

Once terms are established, staff will make a recommendation to the Village Board for approval of the contracted software and consultant services.

VILLAGE OF ADDISON
Request For Proposal Form

The proposer shall also include with their returned RFP a signed copy of the enclosed affidavit as required within the Request for Proposals Specifications.

The undersigned proposer, having examined the specifications and other documents, hereby agrees to supply software and services as per the attached specifications and to perform other work stipulated in, required by and in accordance with the proposal documents attached for and in consideration of the proposed prices.

The undersigned acknowledges receipt of addendum(s):_____;_____;_____.

PLEASE SUBMIT ONE (1) ORIGINAL HARD COPY, TWO (2) ADDITIONAL HARDCOPIES AND TWO (2) USB DRIVES

CONTACT: FOR CLARIFICATION OF THIS PROPOSAL

FIRM NAME	NAME
ADDRESS	PHONE NUMBER
CITY/VILLAGE, STATE AND ZIP CODE	FAX NUMBER
SIGNATURE AUTHORIZED REPRESENTATIVE / DATE	E-MAIL ADDRESS
PRINT NAME / TITLE	

Sealed Proposal

(Attach to outside of Proposal)

RFP Number #17-5-5
A Computerized Maintenance
Management System (CMMS)/Enterprise
Asset Management (EAM)

DUE DATE: June 21, 2017
TIME: 11:30 AM

TIME OF RECEIPT:

_____

FROM (Company, First/Last Name, Phone, Email):

_____

_____

VILLAGE OF ADDISON

General Terms and Conditions

The following conditions apply to all purchases or services and become a definite part of each invitation to bid. Failure to comply may disqualify your bid.

1.   <u>Non-Discrimination In Employment</u> - The Contractor, in performing under this contract, shall not discriminate against any worker, employee or applicant, or any member of the public because of race, creed, color, age, sex, or national origin, or otherwise commit an unfair employment practice. The bidder, his sub-contractors, or labor organizations furnishing skilled or unskilled workers, craft union skilled labor, or anyone who may perform any labor or service, shall not commit within the State of Illinois, under this contract, any unfair employment practices as defined in the act of the 72nd General Assembly entitled "Fair Employment Practices Act". The Contractor is referred to Ill-Rev. Stat. (1961) Ch. 48, paragraph 851 <u>et seq.</u> The contractor further agrees that this article will be incorporated by the
Contractor in all contracts entered into with suppliers of materials or services, contracts and subcontractors, and all labor organizations furnishing skilled, unskilled and craft union skilled labor, or who may perform any such labor or services in connection with this contract.

2.   <u>Compliance to Law</u>
    a)   The Proposer shall at all times observe and comply with all laws, ordinances, regulations and codes of federal, state, county, and village governments and/or any other local governing agencies which may in any manner affect the preparation of proposals or the performance of this contract.
    b)   All merchandise or commodities must conform to all standards and regulations as set forth under the Occupational Safety Hazards Act (O.S.H.A.).

Vendor Contact Information

PLEASE LET US KNOW WHO WE SHOULD CONTACT REGARDING THIS PROPOSAL.

Please attach business card here

IF YOU DO NOT HAVE A BUSINESS CARD, PLEASE TYPE YOUR INFORMATION BELOW:

Company Name:

Company Address:

City: State: Zip Code:

Name of Contact Person:

Title: Phone Number:

E-mail:

VILLAGE OF ADDISON

Contractor's Drug-Free Workplace Certification

Pursuant to "30 ILCS 580/1 et seq. ("Drug-Free Workplace Act"), the undersigned contractor hereby certifies to the Village of Addison that it will provide a drug-free workplace by:

A.   Publishing a statement:

1. Notifying employees that the unlawful manufacture, distribution, dispensation, possession, or use of a controlled substance, including cannabis, is prohibited in the contractor's workplace.

2. Specifying the actions that will be taken against employees for violations of such prohibition.

3. Notifying the employees that, as a condition of employment on such contract or grant, the employee will abide by the terms of the statement: and

B.   Notify the Village of Addison of any criminal drug statute conviction for a violation occurring in the workplace no later than 5 days after such conviction.

1.   Establishing a drug-free awareness program to inform the employees about:
    a) The dangers of drug abuse in the workplace.
    b) The contractor's policy of maintaining a drug-free workplace
    c) Any available drug counseling rehabilitation and employee-assistance program.
    d) The penalties that may be imposed upon employees for drug violations.

2.   Making it a requirement to give a copy of the statement required by subsection (A-3) to each employee engaged in the performance of the contract and to post the statement in a prominent place in the workplace.

3.   Notifying the Village of Addison within 10 days after receiving notice.

4.   Imposing a sanction on or requiring the satisfactory participation in a drug abuse assistance or rehabilitation program by any employee who is so convicted, as required by "the Drug-Free Workplace Act".

5.   Assisting employees in selecting a course of action in the event drug counseling treatment and rehabilitation is required and indicating that a trained referral team is in place.

6.   Making a good faith effort to continue to maintain a drug-free workplace through implementation of this Section.

Failure to abide by this certification shall subject the contractor to the penalties provided in the "Drug-Free Workplace Act".

_____

Contractor's Signature

_____

Date

Affidavit of Compliance

APPLICANT: _____

Name

_____

Address

Federal Tax I.D. #_____

As a condition of entering into a contract with the Village of Addison, and under oath and penalty of perjury and possible termination of contract rights and debarment, the undersigned,

(Please Print or Type) _____

being first duly sworn on oath, deposes and states that he is _____

_____

(the sole owner, a partner, a joint venturer, the President, the Secretary, etc.) of _____

_____(Name of Company), the party making the foregoing bid, and that he has the authority to make any disclosures or certifications required by this Affidavit on behalf of the bidder and that all the information contained in this Affidavit is true and correct in both substance and fact.

BID RIGGING AND BID ROTATING

Section 1: That in connection with this procurement,

    A. The bid is not made in the interest of or on behalf of any undisclosed person, partnership, company, association, organization or corporation;

    B. The bidder has not in any manner directly or indirectly sought by consultation, communication or agreement with anyone to fix the bid price of said bidder or any other bidder or to fix any overhead profit or cost element of such bid price or that of any other bidder or to secure any advantage against the public body awarding the contract or anyone interested in the proper contract;

    C. The bid is genuine and not collusive or sham;

D. The prices or breakdowns thereof and any and all contents which had been quoted in this bid have not been knowingly disclosed by the bidder and will not be knowingly disclosed by the bidder directly or indirectly to any other bidder or any competitor prior to opening;

E. All statements contained in such bid are true;

F. No attempt has been made or will be made by the bidder to induce any other person or firm to submit a false or sham bid;

G. No attempt has been made or will be made by the bidder to induce any other person or firm to submit or not to submit a bid for the purpose of restricting competition;

Section 2. The undersigned further states that: **(circle A or B)**

A. He is the person in the bidder's organization responsible within that organization for the decision as to the prices being bid herein and that he has not participated, and will not participate, in any action contrary to paragraphs A through G above; or

B. He is not the person in the bidder's organization responsible within that organization for the decision as to the prices being bid herein but that he has been authorized to act as agent for the persons responsible for such decision in certifying that such persons have not participated, and will not participate, in any action contrary to paragraphs A through G above and as their agent does hereby so certify; and

C. That he has not participated, and will not participate, in any action contrary to paragraphs A through G above.

Section 3. The undersigned certifies that the bidder has never been convicted for a violation of State laws prohibiting bid rigging or bid rotating.

Section 4. The undersigned further affirms that within thirty (30) days after receiving notice from an employee of a conviction of a violation of the criminal drug statute occurring in the aforementioned company's workplace he shall:

A. Take appropriate personnel action against such employee up to and including termination; or

B. Require the employee to satisfactorily participate in a drug abuse assistance or rehabilitation program approved for such purposes by a federal, state, or local health, law enforcement, or other appropriate agency.

TAX COMPLIANCE

Section 5. The undersigned on behalf of the entity making the foregoing proposal certifies that neither the undersigned nor the entity is barred from contracting with the Village of Addison because of any delinquency in the payment of any tax administered by the State of Illinois, Department of Revenue, unless the undersigned or the entity is contesting, in accordance with the procedures established by the appropriate revenue act, liability of the tax or the amount of tax.

Section 6.   The undersigned or the entity making the proposal or bid understands that making a false statement regarding delinquency in taxes is a Class A Misdemeanor and in addition, voids the contract and allows the municipality to recover all amounts paid to the individual or entity under the contract in a civil action.

EQUAL EMPLOYMENT OPPORTUNITY

Section 7. This EQUAL EMPLOYMENT OPPORTUNITY CLAUSE is required by the Illinois Human Rights Act and the Rules and Regulations of the Illinois Department of Human Rights published at 44 Illinois Administrative Code Section 750, et seq..

Section 8. In the event of the contractor's noncompliance with any provision of this Equal Employment Opportunity Clause, the Illinois Human Right Act, or the Rules and Regulations for Public Contracts of the Department of Human Rights (hereinafter referred to as the Department) the contractor may be declared non-responsible and therefore ineligible for future contracts or subcontracts with the State of Illinois or any of its political subdivisions or municipal corporations, and the contract may be canceled or avoided in whole or in part, and such other sanctions or penalties may be imposed or remedies involved as provided by statute or regulation.

During the performance of this contract, the contractor agrees:

A.   That it will not discriminate against any employee or applicant for employment because of race, color, religion, sex, age, disability, citizenship status, national origin, veteran status, marital status, sexual orientation, gender identity or any other characteristic that is protected by law.   Further, that it will examine all job classifications to determine if minority persons or women are underutilized and will take appropriate affirmative action to rectify any such underutilization.

B.   That, if it hires additional employees in order to perform this contract, or any portion hereof, it will determine the availability (in accordance with the Department's Rules and Regulations for Public Contracts) of minorities and women in the area(s) from which it may reasonably recruit and it will hire for each job classification for which employees are hired in such a way that minorities and women are not underutilized.

C.   That, in all solicitations or advertisements for employees placed by it or on its behalf, it will state that all applicants will be afforded equal opportunity without discrimination because of race, color, religion, sex, marital status, national origin or

ancestry, age, physical or mental handicap unrelated to ability, or an unfavorable discharge from military service.

D.   That it will submit reports as required by the Department's Rules and Regulations for Public Contracts, furnish all relevant information as may from time to time be requested by the Department or the contracting agency, and in all respects comply with the Illinois Human Rights Act and the Department's Rules and Regulations for Public Contracts.

E.   That it will permit access to all relevant books, records, accounts and work sites by personnel of the contracting agency and the Department for purposes of investigation to ascertain compliance with the Illinois Human Rights Act and the Department's Rules and Regulations for Public Contracts.

F.   That it will include verbatim or by reference the provisions of this Equal Employment Opportunity Clause in every subcontract it awards under which any portion of the contract obligations are undertaken or assumed, so that such provisions will be binding upon such subcontractor. In the same manner as the other provisions of this contract, the contractor will be liable for compliance with applicable provisions of this clause by such subcontractors; and further it will promptly notify the contracting agency and the Department in the event any subcontractor fails or refuses to comply therewith. In addition, the contractor will not utilize any subcontractor declared by the Illinois Human Rights Department to be ineligible for contracts or subcontracts with the State of Illinois or any of its political subdivisions or municipal corporations.

Section 9. For the purposes of subsection F of Section 8, "Subcontract" means any agreement, arrangement or understanding, written or otherwise, between a public contractor and any person under which any portion of the public contractor's obligations under one or more public contracts is performed, undertaken or assumed; the term "subcontract", however, shall not include any agreement, arrangement or understanding in which the parties stand in the relationship of an employer and an employee, or between a bank or other financial institution and its customers.

Section 10. It is expressly understood that the foregoing statements and representations and promises are made as a condition to the right of the bidder to receive payment under any award made under the terms and provisions of this bid.

Section 11. Have written sexual harassment policies that shall include, at a minimum, the following information: (i) the illegality of sexual harassment; (ii) the definition of sexual harassment under State law; (iii) a description of sexual harassment, utilizing examples; (iv) the vendor's internal complaint process including penalties; (v) the legal recourse, investigative and complaint process available through the Department and the Commission; (vi) directions on how to contact the Department and Commission; and (vii) protection against retaliation as provided by Section 6-101 of this Act. A copy of the policies shall be provided to the Department upon request.

THE AMERICANS WITH DISABILITIES ACT

Section 12. The Americans with Disabilities Act (42 U.S.C. 12101 et seq.) and the regulations thereunder (28 CFR 35.130) (ADA) prohibit discrimination against persons with disabilities by the State, whether directly or through contractual arrangements, in the provision of any aid, benefit or service. As a condition of receiving this contract, the undersigned vendor certifies that services, programs and activities provided under this contract are and will continue to be in compliance with the ADA.

EMPLOYEE SAFETY AND HEALTH

Section 14. The undersigned shall comply with all applicable Laws and Regulations of any public body having jurisdiction for the safety of persons or property or to protect them from damage, injury or loss; and shall erect and maintain all necessary safeguards for such safety and protection. Contractor's duties and responsibilities for the safety and protection of the work shall continue until such time as all the work is completed and accepted by the Village.

Signed by:_____
[name]
[title]

VILLAGE OF ADDISON

RFP No Response Survey Form

RFP #17-5-5 – Computerized Maintenance Management System (CMMS)/Enterprise Asset Management (EAM)

Reason for not submitting a response: _____

Suggestions you may have that would improve the RFP or your likelihood of response in the future: ____

_____

_____

_____

Company Name:_____

Person Submitting Form: _____ Date: _____

Phone:_____

Email: _____

Would you be interested in receiving RFPs or Bids in the future: _____Yes / _____No