



PROPOSITION A 2011 BOND PROGRAM
CONSTRUCTION DOCUMENT MANAGEMENT SOFTWARE
REQUEST FOR QUALIFICATIONS

APRIL 3, 2012

ADDENDUM NO. 01

RFI Responses:

1. **Question:** Can the Evaluation Criteria starting on page 12 - 18 be provided in an excel spreadsheet file format for us to complete/incorporate into our response?

Response: Exhibit B CONSTRUCTION DOCUMENT MANAGEMENT SOFTWARE – Required Criteria is provided in MS Word version.

2. **Question:** Backup/Archiving to FTP site of all documents to which an organization has access on a regular (minimum monthly) basis. Backups shall be in PDF and XML format. Will this FTP site be provided by the district or the vendor?

Response: Please see the updated Exhibit B CONSTRUCTION DOCUMENT MANAGEMENT SOFTWARE – Required Criteria that modifies this item under the Document and Security Backup criteria.

3. **Question:** Based on our experience in performing system implementations, the scope of work should include development of procedures in the use of the systems, training of users, development of custom reports, and system administration (security rights, etc.). The RFQ states “CDMS companies must be able to start work immediately upon selection, in order to set-up the District program, prepare customized forms and train staff” but it does not specifically list these scope items. Should bidders assume that we are simply delivering a software package and providing help desk-like support, or should we include full implementation scope necessary to allow the District to use the software?

Response: Please see Part III – Contents of Proposals and Evaluation Criteria, Item No. 4 - Proposed Pricing Structure & Implementation Plan that requests an explanation of an implementation plan including, but not limited to, program set-up and training.

4. **Question:** Will a proposal that is based on Commercially Available Off the Shelf software be considered responsive if all functional requirements are met by a combination of the commercial software plus custom programming?
Response: Please refer to Part III – Contents of Proposals & Evaluation Criteria, Item No. 2 – Required Software Criteria that states that (f)eatures must be supported in the software at the time of completing the Table of Required Criteria.
5. **Question:** If commercially available software is permitted, can the requirement for providing CDMS source code be waived?
Response: No.
6. **Question:** Should a proposer base its proposal on one commercially available package if several are available that can meet the functions and the bidder is capable of implementing any of several solutions?
Response: The proposer needs to satisfy the RFQ to the best of his/her ability. Based upon the Proposal, the District will score as outlined in the Evaluation Criteria.
7. **Question:** May we receive a copy of the proposed contract?
Response: The final version of the contract is not currently available. Please refer to the body of the RFQ for minimum insurance requirements.

Attachment: Exhibit B (pdf and Word version)

END OF DOCUMENT

EXHIBIT B

CONSTRUCTION DOCUMENT MANAGEMENT SOFTWARE

REQUIRED CRITERIA

General:

The District requires Construction Document Management Software (CDMS) to generate, store, track, categorize and manage construction documentation. Construction Documentation includes, but is not limited to, Submittals (typically pdf Files of text documents or drawings); Requests For Information (RFI's); Architect's Supplemental Instructions (ASI's); Proposed Change Orders (PCO's); Change Orders (CO's); Daily Inspection Reports (DIR's); Invoices and Progress Payments; Construction Schedules; Meeting Agendas and Meeting Minutes; Correspondence, Memos and Deficiency Notices; and similar documents. Documentation may be prepared by the Construction Contractor (e.g. Submittals, RFI's or Invoices) or by the District (e.g Submittal Responses, Responses to RFI's or Payments). The District must be able to easily access the documents and to track when documents were received or returned, as well as the status of the documents (e.g. Under Review or Returned, Approved or Rejected, etc.). The District also needs to be able to generate reports that list and sort the documents by status (e.g. all submittals that have been approved, invoices paid to date, RFI's under review, etc.) as well as generate alerts when documents requiring review exceed allowable review time. Document generation would include submittals and RFIs (by the Contractor) as well as responses (by the District, which will incorporate reviewer comments), DIR's and Meeting Minutes, COR's and CO's, Payments, and correspondence.

Documents will usually be generated by either the Contractor (and/or its subcontractor) or by the District (and/or its consultants). Each party (Contractor or District) needs to maintain document security within its organization unless / until it chooses to share it with the other party. Once documents are shared, they must be secured so that no further changes can occur without a record of the changes being made. The CDMS must be capable of producing a complete and logically organized set of all documents within the CDMS in both pdf and xml format. The documents must be downloadable to ftp sites where the District and other organizations can each access their own data confidentially.

The District shall have the right to audit the operations of the firm providing the CDMS at a minimum upon implementation and annually thereafter. The CDMS source code shall be provided to the District in the event the firm providing the CDMS becomes insolvent, files for bankruptcy or is otherwise unable to provide the software and support services.

The following table provides a list of the required CDMS Criteria.

- **District Requirements:**
 - **M** – Mandatory Requirement of the District
 - **P** – Preferred Requirement of the District
- **Respondent Entries:**
 - **Y** – Yes, feature is currently supported by software.
 - **N** – No, feature is not currently supported by software.
 - **Comment** – Provide any clarifying comments

DOCUMENT ACCESS		
M	Web-based document storage where all project construction documents are stored and may be accessed by authorized organizations and individuals via an internet site.	
Comment:		
M	Accessed via Web Browser (accessible from any computer, including remote sites with internet access). Compatible with Apple Safari, Mozilla Firefox, and Internet Explorer.	
Comment:		
M	Ability to upload documents (e.g. contract drawings, specifications, daily reports, construction schedules, meeting minutes, etc.) in a variety of formats (i.e. Word, Excel, Adobe Acrobat, MS Project, Primavera, Contract Manager, etc.) and make those available to users for download. Documents shall be grouped into separate categories (Submittals, Requests for Information, Change Order Requests, Change Orders, Payments, Daily Inspection Reports, Meeting Minutes, etc.)	
Comment:		
M	District Construction Manager (CM) or other authorized user is able to create and modify project properties (i.e. Contractor, project location, description, bid amount, project directory etc.).	
Comment:		
M	Email notifications automatically sent to selectable users when new documents are submitted / available for viewing.	
Comment:		

M	Print and Export all reports as (searchable) pdf or printer friendly HTML, also exportable to Excel, XML, or CSV.	
Comment:		
M	Ability to Link From an Item in a Report Directly to the Item by Clicking on it, e.g. in a submittal report if click on a submittal that is 15 days old the system takes you directly to the information on that submittal	
Comment:		
M	Ability to Link Files (i.e. PCO linked to a CO, Submittal linked to a Specification or Drawing)	
Comment:		
DOCUMENT SECURITY & BACKUP		
M	SSL Encryption for secured data exchange between the browser and server (Secure access to all documents and information).	
Comment:		
M	Information security within and between Organizations – documents generated within an organization shall remain secure within that organization unless / until shared with other organization(s).	
Comment:		
M	CM or project manager for each organization to have capabilities to assign users within their organization to a project and to assign user rights which control access to documents based on user class and document type.	
Comment:		
M	Backup/Archiving to FTP site of all documents to which an organization has access on a regular (minimum monthly) basis. Backups shall be in PDF and XML format. Explain ability to maintain stability and ensure no loss of information/data during a project. In addition, please explain the process and ease of archiving all information and data in pdf format at the end of each project. Use additional sheets as necessary (<i>Addendum No. 1 – April 3, 2012</i>)	
Comment:		

M	District has right to audit the operations of the CDMS at a minimum upon implementation and annually thereafter.	
Comment:		
M	District has ability to self-support the CDMS software including the ability to make changes if the CDMS owner is unable to provide continuing software and support services.	
Comment		
M	Tracking of all data changes including who entered or changed data and date change was made.	
Comment:		
M	Ability to tell when reviewer has opened / read an item (submittal, RFI, COR, etc.)	
Comment:		
DOCUMENT TRACKING & CONTROL Submittals		
M	Standard submittal form provided to enter information. Contractor to enter submittal summary information (Title, description, and specification section shall be required fields) and then upload submittal data in electronic format (Word or pdf).	
Comment:		
M	Ability to create multi-item submittal packages with separate per-item review status, transmittals, and re-submittals.	
Comment:		
M	Software tracks date received, date returned, and status. Status designations can be modified to fit District standard designations (e.g. for Submittals, A/AAN/R&R/ACK/RWR).	
Comment:		
M	Provide Submittal Transmittal form for CM to enter review comments & action taken.	
Comment:		

M	Allow for CM to route submittal to third parties (e.g. consultant, internal design or operations & maintenance groups, etc.) by generating design-review transmittals with each submittal package item, to track the status of individual sub-items within the submittal package, and to route each sub-item to the appropriate reviewers.	
Comment:		
M	Allow for Submittal Log to be Pre-loaded into software and each submittal item to be identified and sorted by Type (e.g. product data, shop drawing, sample, closeout item, etc.)	
Comment:		
DOCUMENT TRACKING & CONTROLS Requests for Information (RFI)		
M	Provide standard RFI form to enter information (Contractor to enter RFI data into form and submit.).	
Comment:		
M	Ability to create or attach documents to the RFI form and/or links to other documents within the CDMS	
Comment:		
M	Ability for CM to route RFI to the appropriate reviewers and for reviewers to enter comments into standard response form.	
Comment:		
DOCUMENT TRACKING & CONTROLS Architect Supplemental Instruction (ASI)		
M	Provide standard ASI form to enter information (Architect to enter ASI data into form and submit.). Ability to attach documents to the RFI form and/or links to other documents within the CDMS.	
Comment:		
DOCUMENT TRACKING & CONTROLS Daily Inspection Reports (DIR's) & other Reports/Forms		
M	Ability to attach District-standard DIR form into CDMS or to create a customizable form in CDMS. Also same ability for a variety of other reports/forms such as daily work logs, survey requests, plant inspection reports and testing reports.	
Comment:		

M	Ability to link or attach photos to the DIR form, daily work logs, survey request, plant inspection report or testing report and to link to other documents within the CDMS.	
Comment:		
DOCUMENT TRACKING & CONTROLS..... Contract Changes		
M	Provide standard Proposed Change Order (PCO) form with ability to attach documents and link to other documents within the CDMS. (Contractor to issue PCO)	
Comment:		
M	Ability to attach documents to the PCO form, and link to other documents within the CDMS (e.g. RFI, ASI, submittal, etc.).	
Comment:		
M	Ability for Contractor to include Cost & Time impacts on PCO form.	
Comment:		
M	Ability to track date PCO issued and date responded, with automatic notification after specified days without response.	
Comment:		
P	Ability to select several PCOs to incorporate into District/DSA CO format. Form to incorporate District standard legal language and varying levels of signature approval blocks (varying by CO amount).	
Comment:		
DOCUMENT TRACKING & CONTROLS..... Cost Tracking & Payment Request Management		
M	Ability to enter / import payment bid items cost from an excel spreadsheet	
Comment:		
M	Ability to edit % Complete or Payment Amount each month. Format to be spreadsheet, e.g. all items available for editing at once, rather than needing to edit one item at a time, save, open next item and edit that, etc.	
Comment:		

DOCUMENT TRACKING & CONTROLS..... Correspondence		
M	Ability to generate memos to or from Contractor or District, to attach documents to the Memos, and to reference other documents within the CDMS (e.g. RFI's, ASIs, PCO's, Specification Sections, etc). System to automatically assign sequential memo numbers.	
Comment:		
M	Ability to generate responses to memos. System to automatically generate memo suffixes, e.g. the 1 st response to Memo 32 to be 32.1, 2 nd response to be 32.2, etc.	
Comment:		
M	Ability to generate Meeting Agendas and Meeting Minutes and to attach documents to the Minutes. System to automatically assign sequential meeting numbers.	
Comment:		
DOCUMENT TRACKING & CONTROLS..... Customized District Reporting Forms		
M	Ability to generate logs tracking RFIs, ASIs, PCOs, COs, Submittals, Payments, Memos, DIR's, daily work logs, survey requests, plant inspection reports and testing reports.	
Comment:		
M	Ability to filter logs based on criteria e.g. for Submittals: Specification Section, Days Out, Status (A/AAN/R&R/ACK/RWR); for RFI's: Days out, Status (Open/Closed), Specification Section / Dwg No., Responsibility / Ball-In-Court	
Comment:		
M	Ability to Sort Logs Based on any Criteria, e.g. for Submittal, Specification Section, Days Out, Status, etc.	
Comment:		
M	Ability to Provide Custom Forms to Match the District's Contract Change Order Form and Progress Payment Form or other District Forms When Needed.	
Comment:		
M	Ability to Track Cost Exposure with Links to Requests for Information and Change Order Requests.	
Comment:		

M	Ability to provide Customizable High-level Summary reports for Submittal Turn-around, RFI Turn-around, CO Processing Turn-around, Total Change Order Costs, Total COR Exposure	
Comment:		
DOCUMENT TRACKING & CONTROLS..... Additional Features		
M	Ability to measure productivity benchmarks on a project such as computing average review days for RFIs and submittals, categorize change orders (e.g. differing site conditions, design error/omission, etc.) and track total change order percentages by category.	
Comment:		
P	Ability for Keyword Search of all Documents in Database	
Comment:		
P	Ability for CDMS Generated Notification via email to Team Members of: updates to project information (e.g. entry of a new submittal); changes to project information (e.g. approval of a submittal); and alerts (e.g. submittal under review for >15 days without action)	
Comment:		
P	Ability for District CM to Create Master List of Anticipated Submittals ("Schedule of Submittals") and require Contractor to pick from that list when submitting submittal	
Comment:		
P	Ability to allow online Payment Requests (electronic invoicing) by Construction Manager or Contractor.	
Comment:		
P	Ability to work on Multiple Projects simultaneously without having to exit from one project to work on another.	
Comment:		