REQUEST FOR INFORMATION

for the purchase of a

PROGRAM, PROJECT AND DOCUMENT MANAGEMENT SYSTEM – SOFTWARE

MPA A308-S2

Request for Proposals Issued: March 09, 2016
Deadline for Submittal of Proposals: April 28, 2016
REQUEST FOR INFORMATION FOR THE PURCHASE OF A PROGRAM, PROJECT AND DOCUMENT MANAGEMENT SYSTEM - SOFTWARE

I. Scope Overview

The Massport Capital Programs and Environmental Affairs Department is seeking qualified vendors who can provide the Department with the capital program, project and document management software to manage and track capital projects. This software must meet the requirements set forth in this RFI, and must be flexible and scalable in order to meet the Department’s future financial planning, implementation and reporting needs with regard to construction projects and capital improvement programs.

The Department is seeking a system that will support the real-time business activity for planning, controlling and monitoring of capital construction projects.

To control the overall implementation cost of the system, the Department will make every reasonable attempt to use the software as proposed without modification. However, the proposal must discuss configuration and/or modification options based on experience with other customers to effectively achieve the necessary Department’s requirements. The requirements contained in this RFI represent the Department’s vision of a capital program, project and document management system. As such, we realize that the requirements may exceed the offerings currently available in the marketplace. For this reason proposals will be evaluated in their entirety with attention to immediate functionality as well as flexibility to accommodate changing requirements and technology.

Proposals should clearly delineate how the software system can best satisfy the stated requirements and how the implementation approach will minimize the risk of delayed implementation. The Department expects the proposals to include recommendations for hardware to satisfy stated performance requirements. However, the Department may choose to acquire hardware through a separate process.

II. Department Overview

The Capital Programs and Environment Affairs Department is responsible for the development of capital projects at all Massport facilities. The Department’s mission encompasses four main functions described below:

Capital Programming - Responsible for the development of the short and long term Capital Program for the Authority. The Capital Program is a prioritized list of infrastructure projects selected to optimize Massport’s infrastructure investments while allowing our operating departments to remain competitive in their delivery of services. The Capital Program is currently approximately $400M per year.

Project Delivery - Responsible for the delivery of the infrastructure projects approved as part of the Capital Program. This is accomplished through a mix of Massport developed projects and privately developed projects. In the case of Massport developed projects, our project teams are responsible for development of the project scope, designer selection, design management, public bidding, construction management, and commissioning. In the case of privately developed infrastructure,
our teams are responsible for development of the request for qualifications, request for proposals, management of the selection process, and oversight of the design and construction phases.

Technical Expertise - Provide numerous technical functions to all Massport facilities such as facility inspections, infrastructure record keeping, emergency troubleshooting, environmental compliance, safety management, and utilities purchasing and billing management.

Other Related Services - Provide to all Capital projects the following support efforts, as necessary: project controls, survey, construction management, resident inspection, environmental services relating to project permitting and soil/groundwater management, safety inspections and audits, and utilities management to include procurement, metering, budgeting, and billing. These services are also provided on an operational basis to Aviation and Maritime Departments. Additionally, the Capital Programs and Environmental Affairs Department manages the review, approval, and construction oversight of tenant design and construction projects.

III. Background and Current System Utilization

In January 2014, MPA’s Capital Program Department conducted an assessment of the Department’s information technology portfolio with respect to the Department’s current and future needs, and developed a roadmap of technology initiatives. The major purpose of this assessment was to eventually acquire and implement a comprehensive project management system.

The objectives of the assessment were to:
- Maximize the technology investments made by the Department
- Eliminate redundancy and duplication of systems
- Integrate of systems within and outside the Department providing staff and management, the ability to review, analyze and make informed decisions

The following table lists the numerous applications and functions for the various systems currently used by Capital Programs.

<table>
<thead>
<tr>
<th>No.</th>
<th>Application Name</th>
<th>Application Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Oracle Primavera Contract Manager</td>
<td>Utilized to capture and maintain information relating to executed contracts including funding, budgets, commitments, expenditures, amendments, change orders and forecasts. The system is also used to capture procurement opportunities. This system is hosted internally.</td>
</tr>
<tr>
<td>2</td>
<td>Oracle Primavera P6</td>
<td>Utilized for developing and tracking schedules for all Capital Program projects. The database includes summary level executive templates as well as detailed schedules from designers/contractors/construction managers for large scale projects. This system is hosted externally with Loadspring Solutions.</td>
</tr>
<tr>
<td>3</td>
<td>Adept 2013</td>
<td>Adept is a legacy application used for drawings and document management. It’s a desktop and web-based application containing approximately 150,000 as-built drawings comprised of digitized blue prints and base plans.</td>
</tr>
<tr>
<td>4</td>
<td>ACES – Automated Contract Execution System</td>
<td>ACES is an authority wide application utilized by all departments to centrally record the execution of contracts.</td>
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<tr>
<td></td>
<td>Application/Tool</td>
<td></td>
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<tr>
<td>5</td>
<td>Oracle PeopleSoft</td>
<td>PeopleSoft is the Authority’s overall accounting system.</td>
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<tr>
<td>6</td>
<td>Oracle Hyperion</td>
<td>Hyperion budgeting is used for preparing the 5-year rolling Capital Program as well as annual operating budgets.</td>
</tr>
<tr>
<td>7</td>
<td>Calance Middleware</td>
<td>This customized middleware integrates the transfer of data (Invoices and Requisitions) from Contract Manager to PeopleSoft, as well as payment information and internal charges from PeopleSoft to Contract Manager. This integration also allows for the transfer of the Capital Program from Hyperion to Contract Manager.</td>
</tr>
<tr>
<td>8</td>
<td>IBM Maximo</td>
<td>IBM Maximo is currently being implemented as the primary system for Work Order Management at various locations at Logan Airport. Asset data is populated for Logan locations including attributes pertaining to Asset ID, Asset Clarification, and Asset Type. The intent is to expand the utilization of this system as a true Enterprise Asset Management System serving the functions of Asset Management, Maintenance Management and Reliability Engineering.</td>
</tr>
<tr>
<td>9</td>
<td>B2G</td>
<td>B2G tracks M/WBE Goals and Participation. Designers, contractors and construction managers are required to input data into the system. This application is externally hosted.</td>
</tr>
<tr>
<td>10</td>
<td>LCP Tracker</td>
<td>LCP Tracker tracks certified payrolls and prevailing wages. Contractors and construction managers are required to input data into the system. This application is externally hosted.</td>
</tr>
<tr>
<td>11</td>
<td>MTES – Massport Trust Engineer System</td>
<td>The MTES system is a web based application used to log annual inspections and walkthroughs of MPA facilities and log non conformances.</td>
</tr>
<tr>
<td>12</td>
<td>MSIS – Massport Safety Inspection System</td>
<td>This is an internal application used by Environmental and Safety to log, track and resolve non-conformances identified during inspection of facilities.</td>
</tr>
<tr>
<td>13</td>
<td>MGP – Massport Geographic Portal</td>
<td>MGP was developed to provide real time spatial information to all authorized users. The system shares and spatially renders data from other systems such as Common Lease Management System (CLMS) and Utility Management System (UMS).</td>
</tr>
<tr>
<td>14</td>
<td>DBo2 (Predictive Solutions)</td>
<td>DBO2’s system is an analysis and safety inspection software program that helps predict and prevent worker injuries while improving quality and productivity. The system serves as a &quot;net of prevention&quot; by identifying hazards and unsafe trends before they become accidents.</td>
</tr>
</tbody>
</table>

FRED is a utility billing system that tracks usage and bills tenants, provides financial interfaces to PeopleSoft (FARS) for Accounts Payable, Accounts Receivable and General Ledger, and provides energy management reporting. It consists of multiple software programs and hardware, including handheld meter reading devices (ITRON FC300) and field installed cell signal devices – electronic radio transmitters.
DDMS – Digital Drawing Management System

DDMS allows users to search and retrieve information pertaining to facilities, systems and assets using various parameters.

Revit

Revit is a building design and construction software built primarily to support the Building Information Modeling process. It includes features for architectural, structural, and MEP design and construction.

AutoCAD

AutoCAD is a computer-aided design software used for creating, updating and maintaining architectural and engineering-related information in both 2D and 3D. Massport utilizes several versions of AutoCAD including Map 3D and Civil 3D.

Navisworks Manage

Navisworks Manage is a comprehensive project review solution which supports project coordination, analysis, and communication between design, owner, and A/E teams. The clash detection tools provide assistance in anticipating and minimizing potential conflicts before construction is underway.

BIM360 Field

BIM360 Field is primarily used to manage punch lists and issues during construction as well as generate resident engineer weekly reports.

Bluebeam

Bluebeam provides the ability to create, markup, and edit PDFs. Additionally, it allows for collaboration and a paperless workflow through Bluebeam Studio, assisting teams with management of projects and real time PDF work.

Acumen Risk

Acumen Risk is used to analyze the integrity of schedules and run risk analysis/probability for large scale projects to determine realistic durations. It is also being used to track risk registers for the project.

IV. SCOPE OF WORK

The Department is seeking comprehensive capital project and program management software that can meet its current and future information system needs and service requirements. The following is a detailed scope by each functional area:

- **System and Environment**
  - Web Based, “No Code on the Client”
  - Compatibility with Commercial Browsers
  - Open database – not proprietary
  - Provide User Acceptance Tests and Conference Room Pilots in addition to training

- **Business Process**
  - The ability to configure reminders
  - The ability to create both global and project specific processes
  - The ability to customize email notifications
  - The ability to view Action Items on Dashboard or Home Page
• **Workflow Management**
  - The ability to easily create workflows for routing documents between project participants for review and approval.

• **Program Planning**
  - Ability to perform portfolio planning, and manage multi-year Capital Plans

• **Document Management**
  - The desire for having a centralized document repository to store and manage project documents within the PM system
  - The ability to email and print documents from system
  - The ability to view project specific email history
  - The ability to route files
  - The ability to view document access history
  - The desire for full text search
  - The ability to integrate with MS Office
  - The desire for having universal document, CAD and BIM viewers

• **Engineering Management** – Modules addressing the following:
  - RFI's
  - Submittals
  - Transmittals
  - Meeting Minutes
  - Drawing Sets and Lists
  - Daily Reports
  - Punch Lists
  - Bulletins / Directives
  - Safety
  - Non Compliance
  - QA/QC and Environmental Construction Testing
  - Minority and Women Business Tracking
  - Certified Payroll Tracking

• **Consultants/Contractors Management**
  - The ability to maintain a master list of Consultants, Sub-Consultants, Contractors and Sub-Contractors
  - The ability to run reports and evaluate the amounts paid to each consultant/contactors by type of project, contract WO etc. as needed

• **Bid Management**
  - The desire to utilize an online bidding system to extend bid packages and receive bids electronically.
• **Budget - Cost Management**
  - The ability to create and manage both cost and finance codes at a project and program level
  - The ability to create funding and budget contracts, as well as commitments.
  - The ability to track and approve change orders
  - The ability to track expenditures by both cost and finance codes at a project and program level
  - The ability to generate forecasts by both cost and finance codes at a project and program level
  - The ability to track payments to vendors including minority/women-owned enterprises
  - The ability to create cash flows using distribution curves
  - The ability to develop custom fields and forms

• **Schedule Management**
  - Ability to manage both project and program schedules with key milestones and tasks.
  - The ability to integrate with external scheduling tools mainly Primavera, MS Project.
  - Resource planning for internal personnel
  - Collaborative schedule development with contractors, designers, MPA (i.e. Pull Plans)

• **Communication / Collaboration**
  - The ability to support mass communication and notification (via mass emails, bulletin boards, etc.)
  - The ability to provide targeted communications and notifications (selective, rule based notifications via email)
  - The ability to support real-time group communication (on-line chats, discussion forums, instant messaging)
  - The ability to link to iCloud calendar
  - The ability to transmit and store all file types

• **Reporting**
  - The ability to easily create forms and reports
  - The ability to export reports to Microsoft Excel
  - The ability to run reports from a dashboard
  - The ability to schedule and automatically run reports

• **Other Features**
  - The ability to perform conceptual estimates from PDF drawings
  - The ability to generate RFIs from a Revit Model
  - The ability to prequalify vendors
  - The ability to integrate with PeopleSoft
  - The ability to integrate with Maximo

• **Tenant Alteration Application program**
  - The ability to isolate TAA projects from capital projects for the purposes of tracking activity
  - The ability to compile review comments in a central location for TAA projects
  - The ability to generate review reminders for TAA projects
- The ability to generate letters, memos and permits from basic data on individual TAA projects

- **Drawings/Model (BIM) Management**
  - Ability to support multiple file formats (Revit, Navisworks, CAD, PDF, etc.)
  - Ability to accommodate a large number of projects (150,000 stored currently in Adept) or to export directly to document management system
  - Ability to enter annotative comments and appending documents, images and links for project documentation.
  - Ability to import/export data from existing systems and databases (document management system, GIS, etc.).
  - Ability to perform drawing or model comparison
  - Ability to perform Design, As-Built, and Record document reviews for projects and distribute results to project team
  - Ability to calculate PPC manually or automatically at specified times or project milestones
  - Ability to track BIM uses manually or automatically at specified times or project milestones
  - Ability to provide online help

- **Design Review Management**
  - Version control
  - Accessibility to necessary viewers
  - Reviewer workflow management
  - Automated review reporting
  - Drag and drop MPA standards in comments
  - Archival function for all project submittals
  - Collaborative reviews among users
  - All electronic - paperless

**PROPOSAL CONTENTS**

Each proposal shall include a description of the type, technical experience, background, qualifications and expertise of the Proposed System as described in this RFI including, but not limited to, the Scope of Work included.

Proposals shall contain the following:

A. **Executive Summary**
   Provide an overview of the entire proposal describing the general approach or methodology the System will use to meet the goals and fulfill the general functions as set forth in this RFI.

B. **Table of Contents**

C. **Identification of the Proposer**
   1) Legal name and address of the company.
   2) Legal form of the company (corporation, partnership, etc.).
   3) Subsidiaries and affiliations.
   4) Address and phone number of the office that will be primarily responsible for providing services
for this Proposal.

5) Business License Number(s)/Classification(s).

D. Company Information

1) Provide total number of professional staff employed by the firm.
2) Provide brief biographies of individuals that will be working directly with the Department.
3) History of the Firm including Company leadership and how long they have been with the specific Company.

E. Experience and Technical Competence

1) Experience:
The Proposer shall provide a description of how the Proposer’s experience, technical and professional skills will meet the goals and fulfill the general functions identified in this RFI.

   a) The Proposer shall state the number of years the firm has conducted business. Proposer must have at least five (5) years of experience in providing the required scope of services for public clients. Please provide three (3) references from your public clients to support the number of years of experience. Include the name, address, phone number, e-mail, and other contact information of each reference.

2) Project Specific Experience:
Relevant Experience: The Proposer shall provide a description of the three (3) most relevant and comparable software contracts held by the firm, to include:

   a) Description of the role(s).
   b) Dollar value of the project.
   c) Project description - Describe project information that explains in detail the scope of previous projects. Vendors should explain how the implementation scope was effectively achieved in terms of level of difficulty and functional structure as it pertains to the scope area of this RFI.
   d) Staffing
   e) Duration of the project.
   f) Contact name, position, entity name, telephone number, fax number, and e-mail address.
   g) Demonstration of staffing tasks being efficiently completed on time and within the allocated budget.

F. Technical Requirements

For each Scope of Work Requirement, please include the following elements:

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Standard Feature</th>
<th>Configurable by User</th>
<th>Customizable by Vendor</th>
<th>Not Available</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>System and Environment</td>
<td>Web Based, “No Code on the Client”</td>
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<tr>
<td>Compatibility with</td>
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</tbody>
</table>
G. Integration Functionalities
   1) Please provide a brief summary that outlines the built-in capability of your software to integrate with our Department current Systems as highlighted in Section III.
   2) Please provide a brief summary that outlines the mobile capability, technical makeup and mobile software products (including third party, if any) currently available for your asset management software product.

H. Ongoing Support and Maintenance
   1) Ongoing Support: Describe how ongoing technical support will be provided:
   2) Software Maintenance: Describe how new software releases, system upgrades, and bug fixes are released, distributed and installed.
      a) What is the frequency of software update releases, and how many new releases have there been in the past five years?
      b) What is the impact on the users, technical support personnel, and the database?
       Upgrades of the system and application product should not affect in-house tailoring, should be transparent to the user and automated—address this issue in detail.

I. Litigations and Legal Proceedings
   The Consultant shall also provide copies of litigation and legal proceedings information, signed under the pains and penalties of perjury, in a separate sealed envelope entitled “Litigation and Legal Proceedings”. See http://www.massport.com/business-with-massport/capital-improvements/resource-center for more details on litigation and legal proceedings history submittal requirements.

V. EVALUATION CRITERIA
   Evaluation criteria will include:
   • Responsiveness to the proposal specifications and detailed submittal requirements. Proposals found to be incomplete may be rejected as non-responsive.
   • Previous successful installation of proposed software in the Commonwealth of Massachusetts is preferred. However successful installations of proposed software in a public sector agency outside the Commonwealth of Massachusetts are also deemed appropriate for evaluation.
   • Proposal must be a comprehensive management information software application that includes the functionality identified in the Scope of Work.
   • Overall functionality of the software system
   • Maintenance and support programs

VI. PROCEDURES
   The process and timeline Massport intend to undertake is depicted in the flowchart below. Upon the receipt of responses to this solicitation, Massport intends to invite vendors for
demonstrations/interviews with the intent of shortlisting up to three systems. Subsequently, an RFP will be issued for an integrator to submit a proposal utilizing the shortlisted Systems.

I. GENERAL INSTRUCTIONS

Interested firms are invited to submit twenty-five (25) hard copies, and one (1) electronic copy of the RFP on a portable “thumb-drive” in write protected PDF format. The complete response, together with any and all additional materials, shall be enclosed in a sealed envelope addressed and delivered no later than 2:00 p.m. on Thursday April 28, 2016 to the following address:

Houssam H. Sleiman, PE, CCM,
Director of Capital Programs and Environmental Affairs
Massachusetts Port Authority, Logan Office Center,
One Harborside Drive, Suite 209S,
East Boston, MA 02128-2909

It is the firm’s sole responsibility to ensure that their response is received prior to the scheduled closing time. No corrected or resubmitted Responses will be accepted after the deadline. Faxed responses are not appropriate for submission and will not be accepted or considered.
This Request for Information does not commit the Department to award a contract or pay any costs incurred in the preparation of a response to this request. The Department reserves the right to accept all or part of any responses or to cancel in part or in its entirety this Request for Information. The Department further reserves the right to accept the response that it considers to be in the best interest of the Department.

All requirements must be addressed in your response. Non-responsive responses will not be considered. All responses, whether selected or rejected, shall become the property of the Department. Firms are responsible for checking the website periodically for any updates or revisions to the RFI.

Requests for Information

Questions may be sent via email to CPBidQuestions@massport.com subject to the deadline for receipt stated in the timetable above. In the subject lines of your email, please reference the MPA Project Name and Number. Questions and their responses will be posted on Capital Bid Opportunities webpage of Massport http://www.massport.com/doing-business/_layouts/CapitalPrograms/default.aspx as an attachment to the original Legal Notice and on COMMBUYS (www.commbuys.com) in the listings for this project.

All contacts regarding this Request for Information during the submittal preparation and evaluation period must be done in writing through CPBidQuestions@massport.com

In the event that a firm has contact with any official, employee or representative of the Department in any manner contrary to the above requirements, said firm may be disqualified from further consideration.

Submission Schedule

<table>
<thead>
<tr>
<th>EVENT</th>
<th>DATE/TIME</th>
</tr>
</thead>
<tbody>
<tr>
<td>Solicitation: Release Date</td>
<td>March 09, 2016</td>
</tr>
<tr>
<td>Deadline for submission of written questions</td>
<td>March 23, 2016</td>
</tr>
<tr>
<td>Official answers published (Estimated)</td>
<td>April 06, 2016</td>
</tr>
<tr>
<td>Solicitation: Close Date / Submission Deadline</td>
<td>April 28, 2016</td>
</tr>
</tbody>
</table>

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