CITY OF COLUMBUS
REQUEST FOR PROPOSALS
PROCUREMENT CATALOG SOFTWARE

1.0 INTRODUCTION

Scope: The City of Columbus (City) through its Finance and Management Director, wishes to procure a contract with a procurement catalog management software partner. The City purchased software over ten years ago with Coupa Software (formerly Vinimaya) and currently uses its Aquiire Marketplace software. The City of Columbus Purchasing Office uses Aquiire to house its universal term contracts (UTC) price lists that agencies citywide use to shop and order items available from the City's approximately 500 universal term contracts.

Background: The City uses the data housed in Aquiire to feed its ERP system (Microsoft D365) to create approximately 32,000 purchase orders per year from the catalog. The Aquiire Marketplace provides city departments and divisions the ability to procure items that are on contract. The use of the system ensures that items are purchased at the contract price. This allows the City to limit rogue spend, and to eliminate incorrect pricing on contract buying.

The current process starts with creating a purchase requisition (PR) in Microsoft D365. From the PR in D365 we are able to integrate to our current catalog provider (Aquiire) and access our price lists under our current contracts. The price lists are in 2 different formats. The first being a static Excel price list with standard item information that is transferred to a cart within the catalog software. The other method is punchout to a vendor's catalog that has been setup specifically for the City's use to shop contract pricing. Currently all punchout catalogs to vendor's are accessed from the current catalog provider's platform. The current provider manages the punchout process with the individual vendors and is responsible for the connectivity. Once items are found the item and required data points are transferred back to the cart of the current catalog provider. The basic data points for both methods are: part number, part description, UOM, price, quantity, UNSPSC commodity code, contract number (In D365 Purchase Agreement) and price per unit. Once a cart has been completed in the catalog platform, the items in the cart and all required data points are sent back to the PR in the D365 system where the PR is routed for approval. Once approved a purchase order (PO) is created and the vendor is sent an email notification with a link to the PO.

The goal of this RFP is not to find an exact replacement but a system that will allow us to do what we currently do at a minimum and offer other efficiencies that can be leveraged with the selected software. What we hope to gain is additional reporting, electronic invoicing, the ability to send PO information back electronically to the vendor's punchout and ability for vendor to upload revised price lists. The selected partner will assist the Procurement team in this goal.

1.1 **Specification Questions:** Questions regarding this RFP must be submitted on the Bonfire portal by February 13, 2024.   Responses will be posted as asked, no later than February 15, 2023.

1.2 For additional information concerning this bid, including procedures on how to submit a proposal, you must go to the Bonfire portal web site at https://columbus.bonfirehub.com/projects.

2.0 APPLICABLE STANDARDS AND PUBLICATIONS

2.1   Not applicable

3.0   SPECIFICATIONS

3.1   **General Information:**

3.1.1   **Term:** The proposed contract shall be for approximately one year, beginning approximately July 1, 2024 through June 30, 2025. The final term will be negotiated with the finalist. The City would prefer:

3.1.1.1   **Contract Extension**: Subject to mutual agreement, the period covered by the ensuring contract, under the same terms and conditions stated therein can be extended for six (6) additional one-year periods on a year-by-year basis at the same pricing structure.

3.1.2   **Non-disclosure:** The contractor agrees that no information will be disclosed to third parties or published in case studies, advertisements, white papers, customer testimonials, etc. without the written consent of the City.

3.1.3   **Confidentiality and Security:** The contractor will agree to the confidentiality and security agreement attached therein.

3.2   **RFP Overview:** The Offeror's response to this Request for Proposal (RFP) should be a clear and concise description of the Offeror's capabilities and proposed product offerings. The RFP will be evaluated using (1) Competence of the Offeror, (2) Quality of the services offered and the extent to which the services meet the operational needs of the City, (3) Ability, (4) Past Performance of the vendor as determined by customer satisfaction, and (5) Price, total cost of ownership, to include maintenance and operation costs, as well as the expected life of the equipment.

3.2.1   **Process Summary:** The City will appoint an evaluation committee to evaluate proposals received. The committee will evaluate all Offerors and proposals received and rank the Offerors based upon the evaluation criteria specified in the RFP. The committee may then select two (2) or more of the highest qualified Offerors with which to hold additional discussions. The discussions may include, but are not limited to, presentations by the Offerors to the committee to elaborate upon their qualifications, proposals, and/or other pertinent information. Based upon the content of the proposals received including any revisions thereto, and upon any additional discussions with the Offerors the committee shall rank the remaining Offerors based upon the evaluation criteria specified in the RFP. The committee will recommend an award along with a written explanation to the Director of Finance and Management. With the approval of the Director of Finance and Management the Purchasing Department and Offeror will negotiate a contract. With approval from City Council, the Director of Finance and Management and successful Offeror will negotiate a contract. If negotiations fail, negotiations with these Offeror(s) shall be terminated, and the City agency may enter into contract negotiations with another.

3.2.2   **RFP Sequence of Events:** The following RFP sequence of events represents the City's best estimate of the schedule that will be followed. Exact due dates and times for questions / answers (in Section 3.2.2.1) are noted in this document and will be published on Bonfire and in the City Bulletin:
- RFP Issued February 2, 2024.
- Deadline for written questions: February 13, 2024.
- City response to questions: as asked, no later than February 15, 2024.
- RFP Due: March 7, 2024
- Notification of finalists: approximately 20-30 days after RFP due.
- Presentations to City (if needed): approximately 20-30 days after notifications sent
- Negotiations begin: approximately 5-10 days after presentations
- Contract completed: approximately 40 days after completed negotiations

3.2.2.1   **Specification Questions:** Questions regarding this RFP must be submitted on the Bonfire portal by 11 a.m. (local time) on February 13, 2024. Responses will be posted as questions are asked, but no later than 11:00 a.m. (local time) on February 15, 2024.

3.2.2.2   **Communications:** During the solicitation and evaluation process, Offerors are strictly prohibited from communicating with any City employees or officers regarding this solicitation except through the method stated immediately above during the Question & Answer period. Any communication from the vendor to the City after the Question & Answer period should be limited to only what is necessary. Necessary communication required by the City will be communicated clearly to Offerors. If any Offeror has a need to communicate with the City, the communication should come only to the Chair of the Committee. If a City employee attempts to communicate with an Offeror contrary to this provision, the Offeror shall report said incident to the Chair of the Committee. The Chair is Craig Bucher. Craig can be reached at cabucher@columbus.gov or 614-645-6245. A violation of this section on the part of the Offeror will lead to disqualification.

3.2.2.3   **Proposal Submittal Guidelines:** Submit per the instructions on the Bonfire portal.

3.3   **Evaluation Criteria:**

3.3.1   **Section One – Competence (10 points):** The competence of the Offeror to perform the required service as indicated by the technical training, education and experience of the Offeror's personnel who would be assigned to perform the work.

3.3.2   **Section Two** - **Quality and Feasibility (30 points):** The quality and feasibility of the Offeror's technical proposal. Offeror will demonstrate in its project plan how it will best meet the needs and reduce the risks of the City during the implementation process. The committee will give points to Offerors who clearly demonstrate their compliance with the needs defined in the technical specifications. If the Offeror does not include a specific item preferred in the technical specification,

the Offeror will be scored based on its ability to demonstrate how its offer meets the high-quality demands of the City of Columbus.

3.3.3   **Section Three –Ability (10 points):** The ability of the Offeror to perform the required service competently and expeditiously as indicated by the Offeror's workload and the availability of necessary personnel, equipment and facilities.

3.3.4   **Section Four – Past Performance (25 points):** The past performance of the Offeror as reflected by evaluations of the city agency, other city agencies and other previous clients of the Offeror with respect to such factors as quality of work, success in controlling costs, and success in meeting deadlines.

3.3.5   **Section Five – Price (25 points):**   Detailed pricing will only be requested of finalists, and will be scored at that time. In the original proposal, please indicate at a high level the pricing model used by your company. For example, does your company use a software-as-service model with an annual fee, does your company require annual licensing fees, are fees calculated entity-wide or per individual user, etc.?

3.4 Section One- Competence (10 Points):

Provide sufficient information in a clear, concise manner to the City to evaluate the competence of Offeror to perform the requested services. Information in Section One should include:

- The technical training of staff assigned to perform on this project.
- Experience of staff assigned to perform on this project. Include details of past projects of the staff you intend to assign to this project. The City will give higher weight to past projects that are most similar to this opportunity. This should include experience with large municipalities and integrations into ERP systems. This should include experience with Catalogs, Punchouts, Reporting, Purchase Requisitions, and Purchase Order and electronic delivery of documents. Be specific, including details such as the modules implemented, integrations completed, size and complexity of organization, etc.
- Previous experience working within the public sector.
- Explain how the City's operational structure is or is not comparable to clients with whom you typically work.
- The extent of your knowledge of the regulations affecting the security of information within the public sector.
- Experience of company as an entity managing projects of this size.
- Location of closest office to downtown Columbus.
- Explain various stages of your company's hiring process. What skills do you require employees to possess to work for your team on projects of this complexity?
- Explain the process used by your company to select contracted staff. What do you require of a contractor in order to make them a part of your team on a project of this complexity?
- List and explain the various subcontracted staff you plan to use on this project. Specifically list and explain any use of subcontractors.

- Explain relevant training and certifications of the staff you intend to assign to this project. If the City were to ask for records showing prior training and certifications, would your company be willing to provide them?
- What are the criteria you use to determine which certifications staff must obtain?
- What is the average tenure of your employees company-wide? Among the employees you plan to assign to this project?
- Explain your company's strategy to deal with turnover of staff as it relates to providing service to your clients.

3.5 Section Two- Quality and Feasibility (30 Points):

Provide detailed information in a clear, concise manner addressing each of the questions listed below. If Offeror proposes to perform the services in a manner inconsistent with any of the statements provided in Section Two, the Offeror should clearly indicate this inconsistency and clearly explain to City how Offeror's proposed solution will meet the City's ultimate goal of receiving services that are in accordance with the highest standards. The City is ultimately interested in a successful implementation of a catalog management system with the ability to transfer information to the City's' ERP system. The City welcomes creative and diverse methods to accomplish this ultimate goal.

In certain sections, the RFP explicitly asks for more information. In other sections, it does not. Offeror may feel free to provide any examples in its proposal that demonstrates Offeror's approach to providing the necessary quality.

Offeror should provide sufficient information for the City to analyze Offeror's project plan to meet the desired level of exceptional service. Offeror should focus on how it proposes to reduce the City's risks, including cost overrun risks, and project timeliness risks. Where appropriate, Offeror should identify such risks within the detailed scope of services section below and clearly indicate its strategy for mitigating the City's risk. This can include methods, project plans, or offers to contractually obligate the Offeror to mitigate risk by promising outcome-based results in addition to or in lieu of input based obligations. Please include any other services or information that your company deems would be helpful or relevant to the City.

3.5.1 Description of the Proposed Procurement Catalog Software Program

- Describe your company's Procurement Catalog Software and services.
- Describe your company's organizational structure and personnel dedicated to support your company's procurement software services.
- How long has your company been offering this catalog software?
- Describe your company's experience with government clients.
- Describe the tools available to users and administrators (online portal, dashboards, self-service reports, mobile app).
- How long is data available online? How is archived data stored and accessed?

3.5.1.1   **Description of the Proposed Procurement Catalog Solution**

- Describe your proposed procurement management solution.
- Describe your company's or your partner's organizational structure and personnel dedicated to support the procurement management solution you are offering.
- How long has this solution been on offer?
- Describe the solution's history with government clients.

3.5.1.2   **Description of the Proposed**

3.5.2   **Interface with City ERP System**

a) The City uses Microsoft Dynamics 365 Finance and Operations (Public Sector) financial software. The city would strongly prefer that the procurement catalog software vendor selected by the City be able to interface and integrate with the accounting system.
b) What protocols (EX:cXML) does your solution support for exchanging data with Dynamics 365 F&O?
c) Has your company successfully interfaced with Microsoft Dynamics 365? Describe a recent project that has involved integration with Microsoft D365 or other ERP systems.

3.5.3   **Reporting**

a) Can report/inquiry data be downloaded in PDF, csv, Excel and other formats?
b) Ad-hoc online reports/inquiries should have the flexibility for filtering data. Please confirm.
c) Reports/inquiries should be available directly to individual users and City departments and can be restricted through security roles or privileges.
d) Describe your reporting/inquiry capabilities and provide samples of reports, inquires or data exports that are available.
e) Can reports be scheduled to run automatically and be emailed --at intervals?

3.5.4   **Implementation**

a) Describe the activities required to implement your Procurement Catalog Software services? Provide a list of activities along with a typical timeline.
b) Describe the City's program implementation and on-going maintenance roles and responsibilities.
c) Describe your company's program implementation and on-going maintenance roles and responsibilities.
d) What testing activities would be performed by your company?

e) What testing activities would be performed by the City before going live with your Procurement Catalog Software services?

f) Can a test application and database be provided for testing, training and kept up for upgrades? Is there a cost to this?

3.5.5   **Customer Support**

a) What training will the City receive to administer procurement management software services?

b) Please describe the available training options such as interactive content, documentation, recorded classes, live virtual training and ongoing training and any associated costs.

c) Do you offer customized and trackable learning plans that can be monitored by an administrator, if so, is there a cost?

d) What other training tools are provided and what are the costs?

e) Will the City have an assigned company representative(s) to manage this program?

f) Does your program offer a dedicated customer service group for the program administrators? During what timeframe?

g) What is your company's problem resolution process and response time?

h) Is customer support provided on a 24/7 basis? Is it live (you get to speak with a person) partially live, partially internet based? If it is not 24/7, which days/hours would customer support be available for City personnel? Where is customer support team based?

3.5.6   **Additional Information**

a) What relationships or partnerships does your company have with other software publishers?

b) Has your company had any legal disputes with other software publishers involving your procurement catalog software? If so, how were these disputes resolved?

c) What difficulties, if any, have your clients encountered integrating your software with D365 ERP software? What was the result? Have any clients been unsuccessful in integrating your solution with ERP software?

d) What is your company's standard procedure or plan to integrate with other systems? Please name other ERP software that your solution has successfully integrated with.

e) What is your company's plan to update integrations as your software or the software of the ERP software is updated?

f) What is your company's plan for version updates? How is this communicated to your clients? Is there a cost / fee for upgrades?

g) How does your company test feature updates?

h) Explain the security protocols used to ensure that procurement data and user log-in data is safe.

i) If your company offers other procurement modules, please give a *brief* listing and explanation of these modules.

j) How does your company measure the intuitiveness of your software for end users?

3.6 Section Three - Ability (10 Points):

The ability of the Offeror to perform the required service competently and expeditiously as indicated by the Offeror's workload and the availability of necessary personnel and equipment. Information in Section Three should include:

- Current workload
- Availability of necessary personnel or plan to add personnel
- Provide copies of the last two company annual financial reports.
- Otherwise demonstrate your company's financial stability.
- Has your company acquired any competitors in the last three years; does your company plan to acquire other companies in the next three years?
- What are your primary metrics for internal quality measurement regarding timeliness? Would you make this data available to the City?
- How often do you experience problems with the timeliness of service completion?
- What checks and balances does your company implement to ensure that work is completed on time without sacrificing quality?

3.7 Section Four- Past Performance (25 points)

3.7.1 Offeror shall provide the following:

Offeror shall include in its proposal three of the attached questionnaires as completed by customers of Offeror. The Offeror may not ask the City of Columbus to complete this form. Please inform these clients that City may reach out to ask specific questions. Questionnaires from clients most similar to the City of Columbus in size and complexity will receive more weight.

Offeror shall also provide the following information.

- Provide customer retention rate for the last five years.
- Provide the average length of relationship with customers.
- Provide any major complaints from customers within the past five years, including lawsuits. Provide your response to said complaint. Information that identifies a client may be removed.
- Explain how your company has changed your service in response to customer suggestions or complaints.
- If a customer is not satisfied, what steps does your company take to make your client satisfied?
- Provide an explanation of how your company measures customer satisfaction. Explain how you use these measurements to analyze and improve your performance.

CITY OF COLUMBUS
REQUEST FOR PROPOSALS
PROCUREMENT CATALOG SOFTWARE

PERFORMANCE QUESTIONNAIRE – Procurement Catalog Software

To:

………………………………………………………………

……….. (*Name of person completing survey*)

Phone: ……………………………… E-mail: ……………………………….

Subject: Past Performance Survey of: ………………………………………

(*Name of Company*)

……………………………………………

….. (*Name of individuals*)

City of Columbus (City) is implementing a process that collects past performance information on firms and their key personnel. The information will be used to assist the City in the selection of firms. The Offeror listed above identified you as someone for whom the Offeror either currently provides a service and/or product or for whom the Offeror has provided this service and/or product in the past. Please take a moment to tell us about this Offeror's performance. The City *may contact you to gather further information* about the Offeror

HOW SATISFIED. Rate each of the criteria on a scale of 1 to 10, with a 10 representing highly satisfied and a 1 representing highly dissatisfied. Use a number in between to show different degrees of satisfaction. Please rate each of these criteria to the best of your knowledge. If you have no knowledge of past performance in a particular area, leave it blank.

NO	CRITERIA	UNIT	YOUR SCORE
1	Ability to meet customer expectations	(1-10)	
2	Ability to financially perform in the best interest of the client and citizens	(1-10)	
3	Ability to maintain schedules and meet deadlines	(1-10)	
4	Ability to increase value	(1-10)	
5	Quality of service	(1-10)	
6	Ability to identify and minimize the user risk	(1-10)	
7	Leadership ability (minimize the need of owner/client direction)	(1-10)	
8	Your comfort level in hiring the firm/individual again based on performance	(1-10)	

_____ Printed Name (of Evaluator)
_____ Signature (of Evaluator)

Thank you for your time and effort in assisting us in this important endeavor. Please e-mail survey back to (Vendor enter your e-mail here).

3.8   Section Five- Price (25 Points)

Detailed pricing will only be requested of finalists, and will be scored at that time. In the original proposal, please indicate at a high level the pricing model used by your company-for the software, training, annual maintenance fees, integration fees, upgrade fees. For example, does your company use a software-as-service model with an annual fee, does your company require annual licensing fees, are fees calculated entity-wide or per individual user, per piece of equipment, etc.