

NAPA SANITATION DISTRICT



COMPUTERIZED MAINTENACE MANAGEMENT SYSTEM  
REQUEST FOR PROPOSALS (RFP)

December 18, 2017

Proposals due: January 26, 2018 at  
3:00p.m.PST

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# Section 1 - Introduction

## A. Project Background

The **Napa Sanitation District (NapaSan)** is located in the Napa Valley in Northern California and provides wastewater collection, wastewater treatment, recycled water distribution, and biosolids management services to the residents and businesses in the City of Napa and surrounding unincorporated areas of Napa County. NapaSan has been serving the public since being organized as an independent special district in November 1945 under the California Health and Safety Code.

NapaSan is updating and enhancing its asset management practices currently in place to assist staff in meeting levels of service at the lowest cost and within acceptable risks. NapaSan currently utilizes two separate Computerized Maintenance Management System (CMMS) systems that are technologically outdated for managing the maintenance of their assets. The purpose of this Request for Proposals (RFP) is to solicit proposals from software vendors to furnish CMMS software suitable for managing the physical assets of NapaSan and linking with other related software systems. As part of this RFP, NapaSan is requesting vendors provide software purchase costs and implementation costs for their solution. Although implementation services will not be awarded as part of this contract, the selected software vendor will be retained for implementation services under separate contract later.

## B. Project Objectives

To keep up with maintenance activities and manage physical assets, NapaSan has been utilizing two separate software packages. Hansen version 7 is used as the CMMS software for the linear assets and InforMP2 enterprise SQL server edition v 6.1 is utilized for the vertical treatment plant and pump station assets. The development of Hansen software ceased in 2007 and support for version 7 ended in 2013. NapaSan has been maintaining the system on their own but it has become a limitation as data remains isolated and is not synchronized with other databases used by staff. Overall, InforMP2 has been meeting the needs of the treatment plant staff; however, the system has limitations and NapaSan wants to evaluate the pros and cons of moving to one system for both their linear and vertical assets.

The intent of a new CMMS for NapaSan is to facilitate the planning, maintenance and administrative functions that are essential for proactive management of NapaSan's assets. The CMMS is intended to be used for linear assets (approximately 270 miles of sewer lines, manholes, and appurtenances, and 26 miles of recycled water transmission pipelines, valves and appurtenances), as well as for the vertical assets (15.4 mgd treatment plant and four conveyance pump stations). The CMMS will serve as an operational and management tool for managing work orders and their transactional workflows, including material management, backlog management, and preventive maintenance management. The CMMS will be the primary tool used to improve maintenance productivity for NapaSan.

Key features that must be provided by the CMMS software include:

- A. Work Orders: Planning, scheduling, assigning personnel or crews, reserving materials, recording costs, and tracking relevant information, such as the problem/malfunction cause, downtime involved, and recommendations for future action. Receiving work requests and customer complaints and, when appropriate, converting work requests or customer complaints into work orders.

- B. Preventive Maintenance: Generating work orders based on a variety of triggers to perform inspections, lubrication, cleaning, overhauls, etc. Creating step-by-step instructions or checklists, maintaining lists of materials required per type of activity/job, and other pertinent details.
- C. Asset Management: Recording data about assets (pumps, valves, underground pipes, etc.) including locations, specifications, construction history, warranty information, service contracts, spare parts, purchase date, expected lifetime, maintenance history, failure history, condition scores, and other information helpful to work order and asset life cycle management.
- D. Asset Inventory: Asset inventory for wastewater collection and treatment facilities. Must have connectivity with software applications listed in this RFP and the ability to import assets from Hansen, MP2 and ESRI systems. Ensure that each asset has a unique ID, provide method to add new assets using a fast, efficient data entry process, and the ability to add and edit inventory seamlessly through GIS.
- E. Inventory Control: Management of spare parts, tools, and other materials including the reservation of materials for particular jobs, tracking where materials are stored, determining when more materials should be purchased, tracking shipment receipts, and tracking inventory.
- F. Purchase Request Management: Provide information to make efficient purchasing decisions and create purchase requisitions for materials to be issued internally to the purchasing department.

## **Section 2 – Detailed Submittal Requirements**

### **A. Key Dates**

The following represents NapaSan’s best estimates of the key dates in the CMMS selection and implementation process. The following Project schedule is tentative and non-binding:

Request for proposals issued.....	December 18, 2017
Deadline for submittal of questions .....	January 17, 2018
Proposals due .....	January 26, 2018
Notification of vendors selected to perform software demonstrations .....	February 9, 2018
Software demonstrations completed .....	February 28, 2018
Notice of Award to selected vendor .....	March 9, 2018
Contract negotiations completed and contract signed .....	April 1, 2018
CMMS implementation begins .....	May 1, 2018
CMMS implementation complete.....	June 28, 2019

### **B. Obtaining Electronic Files**

This RFP and all Appendices will be distributed only as digital files. For access to the RFP and associated files go to [www.napaslan.com](http://www.napaslan.com).

### **C. Scope of Work**

NapaSan is looking for two cost proposals from software vendors. Cost Proposal A is for software, installation and training and Cost Proposal B will be for implementation services. NapaSan expects the vendor to:

Under the Cost Estimate A: Software Procurement

1. Install software
2. Provide Software Maintenance contract for 5 years, renewable after that term in annual increments
3. Provide Admin/Core Team Training

Under Cost Proposal B: Software Implementation

1. Configure software system for linear and vertical assets
2. Integrate software with the following (either through existing software modules, or customization if required)
  - a. ESRI ArcGIS 10.5
  - b. Trakit
  - c. GraniteNet CCTV
  - d. USA Earthnet
  - e. Linko
  - f. Wonderware InTouch 2014R2 SCADA
3. System Testing
4. Reporting
5. Provide end-user training

### **D. Proposal Format and Detail**

NapaSan is seeking responses to this RFP that are brief, relevant, clear, organized, comprehensive, and tailored to this RFP, using the content organization described below. Vendors whose proposals are missing relevant information may be considered unresponsive. Utmost attention should be given to accuracy, completeness, and clarity of content. All parts, pages, figures, or tables should be numbered and clearly labeled. Response information should be limited to pertinent information only. Marketing and sales type information is not to be included.

The proposal should be organized into the following sections:

- Section A - Vendor Background, Experience and Services;
- Section B - Product Descriptions and Recommended Implementation;
- Section C – Responses to NapaSan’s Functional / Technical Requirements (see RFP Appendix A);
- Section D - Total System / Services Costs (see RFP Appendix B); and
- Section E – Services Agreement and Required Signature Forms; (see RFP Appendices C-E).

Omissions and incomplete answers will be deemed unresponsive.

## **1. Section A – Vendor Background, Experience and Service**

Please provide the following information about your company, experience and services. Respond to each item and provide supporting documentation and/or exhibits as requested or desired.

1. Company Name  
Address  
Telephone Number  
Fax Number  
Email Address  
Name of Single Point of Contact  
Name of Person with binding authority to enter into contracts
2. Describe your company's purpose, mission and values and explain how they will support the relationship with NapaSan's CMMS objectives.
3. Provide a history of your company and the proposed software.
4. Financial Stability – Demonstrate the financial wherewithal to execute this Project and back the product for a minimum of 5 years. If public, provide a website link to your audited annual investment reports for the last three (3) years. If private, attach audited financial statements for the last three (3) years.
5. Describe the professional staff available for development, training, implementation, and support services. Include their qualifications and experience and where they are located.
6. Describe general characteristics that differentiate your company from others in the industry. Include any special advantages your services and system provides. Describe how they support decision-making, streamlining tasks, and error reduction to support more productive personnel.
7. Provide a list of five (5) sites similar to NapaSan where software and services are currently utilized, with preference to those in relatively close proximity to our location. Include reference contact information.

## **2. Section B – Product Descriptions and Recommended Implementation**

1. Identify the software by commercial name.
2. Discuss product enhancement updates with regard to frequency and cost to existing customers with maintenance.
3. Explain how the needed legacy data from the existing Hansen and MP2 systems will be transferred to the new CMMS and identify any potential problems and challenges that might be encountered during this step.
4. Identify issues and challenges that NapaSan should anticipate in this software implementation and indicate how these issues are typically resolved using your system.

5. Describe the types of documentation your company provides with the system. Describe any forms and how they are updated and distributed. Specify which documentation and updates are included as part of support services.
6. Describe any available technical support services and each associated cost. If there are different levels of support services, please describe each level and list the services included.
7. Describe System Administration, to include setup and maintenance, reports administration, and disaster recovery and backup.
8. Describe any errors or omissions in this RFP that could affect the scope, schedule and budget to perform the described work.

### 3. Section C – Responses to NapaSan’s Functional / Technical Requirements

Responses to the functional/technical requirements listed in RFP Appendix A - NapaSan CMMS Software Specifications should be provided in this section of the proposal. The following response key code must be used when responding to the requirements:

S	Supported in standard configuration
C	Supported with minor modifications to standard configuration
F	Supported in future version (provide release date)
R	Support through custom report development
M	Supported with modification (customization)
T	Supported with 3 <sup>rd</sup> party or partner product
N	Not supported

Responses should be entered in the spreadsheet provided (available electronically). Proposers must use one code only per requirement. Any requirement that is answered in any other way will be treated as a negative, non-response. Proposers may provide comments stating how the solution meets each requirement, cross-referencing specific requirement numbers. Proposers should place the response code in a separate column in bold type. The proposals submitted, including requirement responses, will be attached to the software license and implementation services contract.

All responses that indicate out-of-the-box, configurable or customizable functionality should be included in the costs submitted in this proposal. In addition, customization costs should be broken out by specific requirement. Functionality available in future versions should not be considered during response to the requirements in this proposal.

NOTE: Appendix A, the “NapaSan CMMS Software Specification” Excel spreadsheet may be obtained free of charge on NapaSan’s website at [www.napas.com](http://www.napas.com) or by emailing Robin Gamble Holley at [rgamble@napas.com](mailto:rgamble@napas.com). The Excel file is in Microsoft Excel 2016 file format and is 32kb in size. A link to the file will be sent electronically, attached to an email reply, to any request received.

#### **4. Section D – Total System / Services Costs**

Include two cost proposals for this RFP. Use the Cost worksheet provided in Appendix B. Submit the completed worksheet as a Microsoft Excel document and as a hardcopy bound within the proposal.

Provide first year software costs and years two through five reoccurring maintenance costs, itemizing all supporting modules or APIs (including but not limited to mobile, SCADA, CCTV) in the provided worksheet, Total System/Service Costs. Base software license and support on 25-30 District users, user-license or ELA recommendation should come from the vendor.

Include cost to provide initial software training for up to 10 users and administrator training for up to 5 users.

Additionally, provide a cost proposal for implementation of software. Included in the implementation costs will be the software configuration for collection and treatment plant assets, integration with primary software systems, system testing, reporting and end-user training. Please note the implementation services will be under a separate contract.

#### **5. Section E – Exceptions, if any, to the NapaSan Professional Services Agreement**

A consultant with an active Professional Services Agreement will be required to perform this work under that Agreement. Consultant will be expected to execute the attached Professional Services Agreement, without any modification (Appendix C), unless specific exceptions are noted with explanation in this section.

#### **6. Section E – Required Signature Forms**

Proposers should include signed copies of the following documents:  
Proposal Submission Form, Appendix D  
Addenda Receipt and Anti-Collusion, Appendix E

### **Section 3 – Evaluation Criteria**

#### **A. Selection Participants**

**Selection Committee.** The Selection Committee will be responsible for the evaluation and rating of the proposals and demonstrations and for conducting interviews. The Selection Committee is responsible for evaluating software functionality, technology architecture, implementation capabilities, value, and other selection criteria. The Selection Committee will make the final vendor selection.

#### **B. Evaluation of Proposals**

The vendor's proposal will be evaluated based on the criteria listed below. These criteria are provided for informational purposes and are not intended to represent an order of preference.

- Clarity/Suitability – Clarity of Vendor's Proposal and ability of proposed system to meet NapaSan's objectives



- Project Team – Qualifications, education, and experience of the key team members involved in the installation, training, and implementation of the system
- Project Management – vendor’s capabilities in project planning, coordination, execution, cost control, quality control, and completing projects on schedule
- Product Demonstrations as requested
- Total System/Services Cost(s) in relation to products/services provided
- Customer Reference & Service
- Compliance with functional and technical requirements
- Vendors history of responsiveness to problems before, during, and after installation
- Compliance with the general bidding requirements, general submittal requirements, and detailed submittal requirements of the RFP
- Other – Additional criteria deemed by NapaSan to be relevant for selection.

### **C. Evaluation Selection Process**

Quantitative evaluation methods will be utilized to determine the vendor that represents the best value solution for the District. Proposals will be reviewed and up to three (3) short-listed vendors will be invited to NapaSan to present a scripted demonstration to present their product to the Selection Committee. A final decision will be made by the Selection Committee after the demonstrations are completed. The judgments of the evaluations by the Selection Committee shall not be subject to appeal.

### **D. Award Procedures**

NapaSan reserves the right to make an award without further discussion of the proposals received. Therefore, it is important that the proposal be submitted initially on the most favorable terms from both a technical and value standpoint.

A proposal may be rejected if it is incomplete. NapaSan may reject any or all proposals and may waive any immaterial deviation in a proposal.

At a minimum, proposals will be evaluated based upon the criteria above, as well as assessments and comparisons that include evaluations of skills/experience, cost, client service and references, and/or other factors. NapaSan may accept that proposal that best serves its needs, as determined by District officials in their sole discretion.

More than one proposal from an individual, firm, partnership, corporation or association under the same or different names, will not be considered.

NapaSan may select and enter into negotiations with the next most advantageous Proposer if negotiations with the initially chosen Proposer are not successful.

## **Section 4 – General Conditions and Requirements**

### **A. Terms and Conditions**

The term of contract shall be for 5 years, from date of award with NapaSan having the option to renew in one year increments.

NapaSan has the right to reject any or all proposals, to engage in further negotiations with any firm submitting a proposal, and/or to request additional information or clarification. NapaSan is not obligated to accept the lowest cost proposal. NapaSan may accept that proposal that best serves its needs, as determined by NapaSan officials in their sole discretion.

All payroll taxes, liability and worker's compensation are the sole responsibility of the Proposer. The Proposer understands that an employer/employee relationship does not exist under this contract.

## **B. Sub-Contractor/Partner Disclosure**

A single firm may propose the entire solution. If the proposal by any firm requires the use of sub-contractors, partners, and/or third-party products or services, this must be clearly stated in the proposal. The firm submitting the proposal shall remain solely responsible for the performance of all work, including work that is done by sub-contractors.

## **C. Insurance**

Provide evidence of workers' compensation insurance, general liability insurance of minimum \$1,000,000 per occurrence, automobile liability insurance of minimum \$1,000,000 per occurrence, and professional liability insurance of minimum \$1,000,000 per occurrence. NapaSan, and its agents shall be indemnified and shall be shown as additional insured for this project.

# **Section 5 – Proposal Submittal Deadline and Proposal Addendum Information**

## **A. Proposal Submission Deadline**

This RFP and all Appendices will be distributed only as digital files. For access to the RFP and associated files go to [napasan.com](http://napasan.com).

The proposal must be submitted electronically on non-returnable CD or flash drive, and in printed form. One (1) original (mark "ORIGINAL COPY") plus six (6) hard copies of the proposal must be submitted. The original proposal package must have original signatures and must be signed by a person who is authorized to bind the proposing firm. All additional proposal sets may contain photocopies of the original package.

Proposals should be delivered to and received at the following address no later than **3:00 p.m. PST** on **January 26, 2018**. Please address your Proposals to:

Robin Gamble Holley  
Administration Office  
Napa Sanitation District  
1515 Soscol Ferry Road  
Napa, CA 94558  
(707) 258-6031

Electronic copies of proposals, completed Excel files (Appendix A), and any questions related to this RFP should be submitted to Robin Gamble Holley at [rgamble@napasan.com](mailto:rgamble@napasan.com). If attachments are greater than 8 MB, then provide a link to download the attachment.

Electronic (email) or facsimile submissions will not be accepted.

There is no expressed or implied obligation for NapaSan to reimburse firms for any expenses incurred in preparing proposals in response to this request. All proposals and attachments submitted to NapaSan in response to this RFP shall remain the property of NapaSan.

All material submitted in response to this RFP and any contract that may be awarded become a matter of public record and shall be regarded as public records. NapaSan will recognize as confidential only those elements in each response which are trade secrets as that term is defined in the law of California and which are clearly marked as "TRADE SECRET", "CONFIDENTIAL", or "PROPRIETARY". Vague designations and blanket statements regarding entire pages or documents are insufficient and will not bind NapaSan to protect the designated matter from disclosure.

Acceptance of a Proposal or other materials during the selection process does not constitute a contract and does not obligate NapaSan to award funds. NapaSan reserves the right to reject any or all proposals or to select the proposal, which in its opinion, is in the best interest of the District.

## **B. Proposal Questions**

Proposal questions will be due on **January 17, 2018 at 3 p.m.** PST. The primary purpose of this is to provide participating firms with the opportunity to ask questions, in writing, related to the RFP. The District may respond with an addendum within five (5) business days.

Submit questions by e-mail to **Robin Gamble Holley** at [rgamble@napasan.com](mailto:rgamble@napasan.com) by the deadlines shown **above**. The email should identify the RFP and project title. All questions and answers may be posted as addenda on [napasan.com](http://napasan.com).

NapaSan may modify the RFP prior to the date fixed for submission of proposals by the issuance of an addendum.

Any addenda to these documents shall be issued in writing. No oral statements, explanations, or commitments by anyone shall be of effect unless incorporated in the written addenda. Receipt of Addenda shall be acknowledged by the Proposer on Appendix E, Addenda Receipt and Anti-Collusion form.

## Appendix A – NapaSan CMMS Software Specifications

The software specifications listed in this Appendix represent the capabilities, features and requirements desired by NapaSan in the to-be-acquired CMMS software. Please note, the list represents the minimum requirements for each heading and it is expected the proposer will expand upon this list.

Instructions:

Please enter responses to the functional/technical requirements using the following response key code. Proposers must use one code only per requirement. Proposers may provide comments stating how the solution meets each requirement, cross-referencing specific requirement numbers. Proposers should place the response code in a separate column in bold type. The proposals submitted, including requirement responses, will be attached to the software license.

Response Codes

Valid Responses	Description	Comments Column
<b>S</b>	Supported in standard configuration	
<b>C</b>	Supported with minor modifications to standard configuration	Provide additional information
<b>F</b>	Supported in future version (provide release date)	Provide additional information
<b>R</b>	Support through custom report development	Provide additional information
<b>M</b>	Supported with modification (customization)	Provide additional information
<b>T</b>	Supported with 3 <sup>rd</sup> party or partner product	Provide additional information including complete descriptive information on the 3 <sup>rd</sup> party or partner product being provided
<b>N</b>	Not supported	

## General System Requirements

NapaSan is seeking a CMMS as its tool to improve maintenance productivity. The CMMS shall leverage the NapaSan’s GIS as the asset register and will support a mobile workforce by allowing users with wireless connectivity to access all system functionality. The system must have the ability to create or designate user-defined fields and data must be stored in a way that makes it accessible for any and all reporting needs (i.e., life cycle, cost analysis, deterioration analysis, etc., may be performed for work and maintenance over the life of the asset and not just each year.) The user interface must be aesthetically pleasing, easy to navigate, and highly configurable with the ability to access reports and display KPIs.

Requirement Number	Requirement Description	Supported	Comments
<b>General System Requirements</b>			
GS-01	Offer web based browser solution using ESRI ArcGIS Server technology		
GS-02	Ability to locate and zoom to using address location service including GIS centerline viewed within the application		
GS-03	Ability to identify features, display infrastructure assets attributes, asset work history, and any pending work with and without a map		
GS-04	Allow users to select (by defining a geographic area on a map) assets in a GIS viewing application and display all assets, asset condition, work history, and pending work information associated to those records		
GS-05	Allow users to select (by defining a geographic area on a map) assets in a GIS viewing application and create work orders associated to the selected assets		
GS-06	Capability to search and view Service/Work Request, Inspections and Work Order locations with and without a map		
GS-07	Provide common GIS mapping tools (Zoom In/Out, pan, identify) within the CMMS and GIS viewing application		
GS-08	Ability to filter a list of assets for assets found in a geographic area		
GS-09	Ability for user to access, maintain and edit asset information directly within the CMMS or indirectly through GIS application		
GS-10	Zoom to the problem area in the GIS viewing application from a given address, intersection, location description, facility name or number, asset ID, and x, y coordinates as entered into the CMMS		
GS-11	Provide an audit trail for edits to service/work requests and work orders, showing the date and time a record was changed, the user who made the change, and the before and after values of the fields that were modified.		
GS-12	User-friendly interface configurable to facilitate limited call taking service/work request processing and work order generation		

Requirement Number	Requirement Description	Supported	Comments
<b>General System Requirements</b>			
GS-13	Supports simultaneous multi-user access with appropriate record locking (or similar process) to insure data integrity through relational database (i.e., how will software handle multiple users simultaneously editing the same work order)		
GS-14	System administrators must be able to define a particular field as required (i.e., must be populated before record can be saved) and to make the requirement that a field must be populated contingent upon the value of another field in the same record, including but not limited to the records Status field		
GS-15	Backend configuration module is be web-based		
GS-16	Ability to create homepage/dashboard for individual users containing links to critical information for each user		
GS-17	Ability to change labels on user screens		
GS-18	Ability to move fields on any screen		
GS-19	Ability to set up custom views for different departments		
GS-20	Ability to hide or un-hide fields on any screen		
GS-21	System must allow flexibility to change the structures/hierarchy as needed with minimal assistance from vendor		
GS-22	System architecture must be such that a parent/child relationship between assets can be established with an easy aggregation/roll-up logic as needed - supports graphical display of asset hierarchy (tree diagram) with drilldown to asset details		
GS-23	System architecture has flexibility to view parent/child relationships in multiple system views (i.e., location, process, power)		
GS-24	System should provide asset condition ratings: -user specified condition ratings -facility condition index -rating on a 1-5 scale		
GS-25	System should provide flags for maintenance on assets - the proposed solution can trigger automatic e-mail alerts and notifications (via Exchange Mail Server) in case of alarms. System should be able to send email notifications to a specific business unit based on asset category or subset of an asset category		
GS-26	Please identify any software components that must be deployed to the Districts desktop, or mobile device, such as: Applications, libraries, plug-ins, JRE, etc., to run the proposed solution and their recommended versions		
GS-27	Please list the browsers supported and their supported versions		
GS-28	Please list the supported versions of SQL server		

Requirement Number	Requirement Description	Supported	Comments
<b>General System Requirements</b>			
GS-29	The proposed solution includes a training environment/role/mode to allow for the training will not impact production transactions, performance or data		
<b>Mobile</b>			
MO-01	Ability to run the mobile software on a variety of smart phones or tablets - (Plant currently uses iPads for SCADA)		
MO-02	Offer mobile solution with ESRI map services for REST services		
MO-03	Supports a mobile workforce by allowing users with wireless connectivity to access all system functionality		
MO-04	Ability for field staff to edit work orders and create follow-up work orders in the field remotely using mobile or web interface		
MO-05	Enable timer on hand-held device to calculate time spent on a work order		
MO-06	Ability to view GIS map when the mobile solution is running on a notebook, smartphone or tablet		
MO-07	Ability to view safety information		
MO-08	Ability to record labor, material and tools used		
MO-09	Ability to work in fully connected mode via Wi-Fi, cellular or other connection		
MO-10	Ability to work in disconnected mode using store and forward capabilities		
MO-11	How is photo archiving handled?		
MO-12	Work orders generated daily from USA Earthnet for locates (integration capability)		

## Integration

NapaSan currently operates with eight primary software applications on a daily basis: Hansen v. 7, Infor MP2, Trakit 2015.1.6, GraniteNet CCTV, Wonderware InTouch 2014R2 SCADA system, USA Earthnet, Linko and ESRI ArcGIS 10.5 software. The selected CMMS will need to import needed legacy data from current CMMS systems (not necessarily all data will be carried over, amount TBD), integrate with GraniteNet CCTV, view the Trakit permit information, and create work orders from SCADA alarms. Additionally, NapaSan utilizes the USA Earthnet and Linko systems and would like to be able to view the information from those applications daily within the CMMS (minimally view the data displayed on the map, ideally be able to retrieve a few fields of pertinent information as well).

Requirement Number	Requirement Description	Supported	Comments
	<b>Integration</b>		
IR-01	The data structure should allow integration with other systems with open databases		
IR-02	Ability to accept SCADA run times for specific assets		
IR-03	Ability to accept other measurement point values from SCADA		
IR-04	Integration with ESRI GIS software v <b>10.5</b> or higher		
IR-05	Integration with GraniteNet CCTV software		
IR-06	How is the media for CCTV accessed?		
IR-07	Provides tools for creating new custom integrations with other systems		
IR-08	Ability to display Trakit release 2015.5.1.6 permit information on the CMMS map		
IR-09	Ability to retrieve data from USA Earthnet and display on CMMS map		
IR-10	Ability to retrieve data from Linko and display on CMMS map		
IR-11	Is asset hierarchy and work history stored within the same data model? If not, describe		
IR-12	Are the supported data models in the CMMS documented and defined?		
IR-13	Can system connect or import legacy Hansen v 7 work order history database?		
IR-14	Can system connect or import legacy Infor MP2 enterprise SQL Server edition v 6.1 work order history database?		
IR-15	Are the supported data models in the CMMS customizable?		
IR-16	Vendor will provide list of SQL tables at implementation		



## Work & Asset Management

This section encompasses work and maintenance activities, inspection tasks, and operations tasks. The system must have the ability to capture all work effort: operations, inspections or maintenance (preventive and reactive). The CMMS must have the ability to create custom fields for the different asset types. The CMMS shall provide the ability to look at time series data for certain data fields. The ultimate goal is to be able to track all costs of the work performed on an asset over multiple years as well as track the performance and condition of that asset over those years.

Requirement Number	Requirement Description	Supported	Comments
<b>Work &amp; Asset Management</b>			
WM-01	Ability to create work requests from inside the GIS viewing application		
WM-02	Track relationship between service request and work order		
WM-03	Allows assigned personnel to select and review work requests and work orders using multiple selections and sorting criteria that include all work request and work order fields		
WM-04	Allow work orders to include multiple assets and asset types. For example all pipes and manholes in a geographic area		
WM-05	Ad hoc query interface with export to Microsoft Office applications		
WM-06	Automatic notification of new work request and work orders to sender and user assigned to receive notification		
WM-07	Ability to create purchase request directly from a work order and follow it in the CMMS		
WM-08	Ability to capture following information to work orders/ tasks/related assets <ul style="list-style-type: none"> <li>• Task descriptions</li> <li>• Parts list – number and quantity required for the job</li> <li>• Safety plans and safety requirements</li> <li>• Labor – hours</li> <li>• Equipment – Hours by types</li> <li>• Special tool (reserved from tool stock)</li> <li>• Attached files (photos, sketches, etc.)</li> </ul>		
WM-09	Ability for system to flag work not completed on time - automatic notification of open work orders after a predetermined amount of time, e.g. when the due date is within "X" days, or after the due date has passed		

Requirement Number	Requirement Description	Supported	Comments
	<b>Work &amp; Asset Management</b>		
WM-10	Allows maintenance lead workers to enter preventive or standing maintenance rules that trigger the automatic creation of work orders		
WM-11	Preventive Maintenance includes elapsed time since the last work order was created or completed		
WM-12	Ability to schedule seasonal or cycle PMs, for instance, schedule activities “between June-September”		
WM-13	View total Labor hours and labor, material, and tool cost anticipated for a PM		
WM-14	Includes associated work request ID (with complaint codes, description, location, and contact information) with link between request and work order		
WM-15	Ability to attach multimedia files to work order		
WM-16	Includes parts and equipment required, reserves parts in inventory system, to be used for the work order or for a task within the work order		
WM-17	Includes instructions and comments to and from workers		
WM-18	Includes estimated and actual labor and equipment hours and costs associated with the work order or a task within the work order		
WM-19	Allows assignment of Work Orders to Individuals, Crews, or outside Contractors		
WM-20	Initiates Warranty inspections for new assets of new components		
WM-21	Allows user to report labor time charged against work orders for a user-defined date range		
WM-22	Provides cost tracking capability that allows each employee’s labor costs to be calculated for work orders		
WM-23	Ability to assign work by geographic area		
WM-24	Display the screening backlog for a specific business unit (i.e., a list of all work orders showing brief description, priority levels and the date-time requested). Allow users to pull up a work order from the screening backlog for reviews and authorization or cancellation		
WM-25	Provide the automatic processes to warn screeners if the type of work requested for an asset is addressed by an existing open work order for the same asset		
WM-26	Captures and stores for assets the results of various inspections including but not limited to manhole inspections, LACP for lateral inspections, CCTV PACP Compliant, inspections for buildings and grounds		
WM-27	Ability to create custom Inspections		
WM-28	Tracks total work history on physical assets that can be moved		

Requirement Number	Requirement Description	Supported	Comments
	<b>Work &amp; Asset Management</b>		
WM-29	The ability to retrieve work history for retired, abandoned or removed assets		
WM-30	Will the software track numerous projects that are part of one larger project		
WM-31	Can an attribute status be changed through the Work Management System (i.e., changing status from planned to active for example)		
WM-32	Ability to track multiple contractors/contract information and tie to work order system		
WM-33	Ability to retrieve costs paid to contractors by contract number and by various criteria		
WM-34	How is contractor assigned work addressed?		

## Reporting

The CMMS must provide a fast and easy means for opening and creating reports. Any user-defined fields must be reportable. The system shall allow users to schedule reports to run automatically on a defined schedule. The system is required to have a reporting capability that is easily configurable and enables the ready, routine, scheduled production of reports on work and maintenance performance and the exceptions to meeting those performance requirements.

Requirement Number	Requirement Description	Supported	Comments
	<b>Reporting</b>		
RP-01	Ability to create dashboards that display KPIs (key performance indicators) as gauges, pie charts, bar graphs, and digital displays		
RP-02	Provide ability to configure customization of colors, range, text, etc., related to user-defined indicators used to display KPIs		
RP-03	The system shall work with standard SQL based report writers where the user can modify existing reports or create new reports based on specific user requirements. What third party reporting tools are supported by your product?		
RP-04	Allow users to schedule reports to run automatically on a defined schedule for a defined distribution list		
RP-05	Ability to create and save custom reports		
RP-06	Ability to print reports		
RP-07	Ability to modify standard system reports		
RP-08	What is available for reporting within the tool vs. through a third party reporting product		
RP-09	A full list of reports will be defined during implementation. At a minimum, the system has the ability to support the following types of reports: <ul style="list-style-type: none"> <li>• Asset Failure rates</li> <li>• Number &amp; type of work orders issued and closed per month</li> <li>• Work order status summary</li> <li>• Regular vs. Overtime hours</li> <li>• Equipment downtime summary</li> <li>• Planned vs. unplanned maintenance, costs, hours, etc.</li> <li>• Mean time between failure</li> <li>• Maintenance schedule compliance</li> <li>• Maintenance cost by work type</li> <li>• Number of work orders generated by PM</li> </ul>		

## Materials Management

The CMMS shall have a Materials/Inventory Management component which will help NapaSan to manage their storeroom in a way that successfully balances the needs of operations and maintenance while optimizing their inventory and carrying costs. The management of spare parts, tools, and other materials including the reservation of materials for particular jobs, tracking where materials are stored, determining when more materials should be purchased, tracking shipment receipts, and tracking inventory should all be accomplished through the materials management component.

Requirement Number	Requirement Description	Supported	Comments
<b>Materials Management</b>			
MM-01	Provides inventory management capability		
MM-02	Provide real-time access to inventory information in Storage Rooms		
MM-04	Tracks the manufacturer, model number, and preferred vendor for a part		
MM-05	Track image of a part		
MM-06	Track an unlimited number of additional specifications for a part (e.g., size, weight) based on a specified part type or category		
MM-07	Issue parts from a Storage Room to an employee (no work order specified), and provide automatic processes to reduce quantity on hand and generate financial transactions to debit and credit the appropriate accounts		
MM-08	Issue parts from a Storage Room to a work order, and provide automatic processes to reduce quantity on hand and generate financial transactions to debit and credit the appropriate accounts		
MM-09	Provide automatic processes to recommend parts and quantities to be ordered based on current quantity on hand quantity already on order, and work order reservations		

## Security & Other Requirements

The CMMS must come equipped with a user friendly online help system. Additionally, an administrator shall have permission to administer accounts, group users into NapaSan defined user groups, and grant various levels of system permissions/authorizations for each user and group. The software must provide an auditing option that will track and monitor changes to every attribute in every table.

Requirement Number	Requirement Description	Supported	Comments
<b>Security &amp; Other Requirements</b>			
SO-01	Provides online and easy to use Help system		
SO-02	Ability to customize Help system. Describe customization process for Help system		
SO-03	Provide multiple levels of system security rights such that some users can be granted the ability to edit certain types of records while other users are granted only the ability to view these records		
SO-04	Provide the ability to administer user accounts and system permissions, including:		
SO-05	-Create and change system logons (usernames) and passwords		
SO-06	-Define standard system permissions for user groups and assign users to one or more groups		
SO-07	-Monitor system usage (see who is logged on) and terminate sessions		
SO-08	-Set a time period of user inactivity after which a user will be automatically logged out of the system		
SO-09	What tools do you use to provide support? What are the turnaround times on initial response, resolution, and bug fixes/minor changes?		

## Appendix B

### 1 - Total System/Services Cost (software only)

#### First Year Expenses

System/Service	Cost	Comments
Itemized Software/Licenses by module/product – Based on 25-30 users (add additional line items as needed)		
Maintenance/Upgrades by module/product (add additional line items as needed)		
Initial Training		
Other (explain)		
<b>TOTAL FIRST YEAR</b>		

#### Renewal Expense, Per Year, for Years 2 through 5

System/Service	Cost	Comments
Itemized Software/Licenses by module/product – Based on 25-30 users (add additional line items as needed)		
Maintenance/Upgrades by module/product (add additional line items as needed)		
Other (explain)		
Other (explain)		
<b>ONE YEAR'S RENEWAL</b>		

This Proposal is submitted by:

Provider Name: \_\_\_\_\_

Representative (printed): \_\_\_\_\_

Representative (**signed**): \_\_\_\_\_

## Appendix B

### 2 - Total System/Services Cost (Implementation Services)

#### First Year Expenses

System/Service	Cost	Comments
System Configuration		
System Integration: Hansen v.7 Infor MP2 2012 v 6.1 Trakit 2015.5.1.6 Wonderware SCADA GraniteNet CCTV ESRI ArcGIS 10.5		
System Integration: USA Earthnet Linko		
System Testing		
Reporting		
End-User Training		
Other (explain)		
Other (explain)		
<b>TOTAL FIRST YEAR</b>		

This Proposal is submitted by:

Provider Name: \_\_\_\_\_

Representative (printed): \_\_\_\_\_

Representative (**signed**): \_\_\_\_\_





# Appendix C -NAPA SANITATION DISTRICT

## PROFESSIONAL SERVICES AGREEMENT (AGREEMENT)

THIS AGREEMENT is entered into on this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_ by and between **CONSULTANT** hereinafter referred to as “CONSULTANT,” and NAPA SANITATION DISTRICT, a California Special District, Napa County, California, hereinafter referred to as “DISTRICT,” as follows:

1. **Notification Information:**

NAPA SANITATION DISTRICT

- Tim Healy, PE
- 1515 Soscol Ferry Road
- Napa, CA 94558
- T: 707-258-6000
- (Fax) 707.258.6048

CONSULTANT

**ATTN:**

- **ADDRESS**
- **ADDRESS**
- **PHONE**
- **Type of Services Provided:**

2. **Authorizations for Professional Services:** Authorization for any and all services under this Agreement shall be solely by written Task Order, executed by the General Manager or Purchasing Agent.
3. **Project:** The project name, number, and location will be defined by future Task Orders.
4. **Scope of Services:** Miscellaneous professional services as described in Task Orders to be issued by the DISTRICT General Manager or Purchasing Agent, and if accepted, performed by the CONSULTANT. The Task Order Form, attached hereto as Exhibit “A”, shall be utilized by CONSULTANT and when completed, shall include Task Order number (issued by DISTRICT), scope of services, time for completion, list of submittals with milestone dates, and a Total Not-to-Exceed Fee amount. The CONSULTANT shall prepare as part of each Task Order a detailed task-cost spreadsheet detailing the major and secondary tasks to be accomplished along with the associated labor classification hours, fees, and other direct costs.

For each Task Order, CONSULTANT shall list the Project Manager, sub-consultants to be utilized, and any other pertinent information. CONSULTANT shall attend Board meetings on an as-needed basis, as directed by DISTRICT.



## Appendix C -NAPA SANITATION DISTRICT

### PROFESSIONAL SERVICES AGREEMENT (AGREEMENT)

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5. **Independent Contractor:** The CONSULTANT is an independent Contractor, and shall not be considered an employee of DISTRICT. Notwithstanding any other DISTRICT, state, or federal policy, rule, regulation, law, or ordinance to the contrary, CONSULTANT and any of its employees, agents, and subcontractors providing services under this Agreement shall not qualify for or become entitled to, and hereby agree to waive any and all claims to, any compensation, benefit, or any incident of employment by DISTRICT, including but not limited to eligibility to enroll in the California Public Employees Retirement System (PERS) as an employee of DISTRICT and entitlement to any contribution to be paid by DISTRICT for employer contributions and/or employee contributions for PERS benefits.
6. **Insurance:** CONSULTANT shall, at no cost to DISTRICT, obtain and maintain insurance during the term of this Agreement. CONSULTANT shall furnish evidence of such coverage, naming DISTRICT, its Directors, officers, agents, employees and designated volunteers as additional insured, as stated in Exhibit "C."
7. **Indemnification:**
  - a. **Non-Design Professional Indemnity Requirement.** To the extent any of the services provided under this Agreement do not constitute "design professional" services and are therefore not subject to Section 2782.8 of the California Civil Code, CONSULTANT shall indemnify, defend with counsel selected by the DISTRICT, and hold harmless the DISTRICT and its officials, officers, employees, agents, and volunteers from and against any and all losses, liability, claims, suits, actions, damages, and causes of action arising out of any personal injury, bodily injury, loss of life, or damage to property, or any violation of any federal, state, or municipal law or ordinance, to the extent caused, in whole or in part, by the willful misconduct, recklessness or negligent acts or omissions of CONSULTANT or its employees, subcontractors, or agents or by acts for which they could be held strictly liable. The foregoing obligation of CONSULTANT shall not apply when (1) the injury, loss of life, damage to property, or violation of law arises wholly from the negligence or willful misconduct of the DISTRICT or its officers, employees, agents, or volunteers and (2) the actions of CONSULTANT or its employees, subcontractor, or agents have contributed in no part to the injury, loss of life, damage to property, or violation of law
  - b. **Design Professional Indemnity Requirement.** To the extent the services provided pursuant to this Agreement are determined to be "design professional" services subject to Section 2782.8 of the California Civil Code, CONSULTANT's duties to indemnify, defend and hold harmless the DISTRICT shall be limited. In such cases, CONSULTANT shall only, to the fullest extent allowed by law, with respect to all design professional services performed in connection with this Agreement, defend with counsel acceptable to DISTRICT, indemnify, and hold DISTRICT, its officers,



## Appendix C -NAPA SANITATION DISTRICT

### PROFESSIONAL SERVICES AGREEMENT (AGREEMENT)

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employees, agents, and volunteers, harmless from and against any and all claims that arise out of, pertain to, or relate to the negligence, recklessness, or willful misconduct of the CONSULTANT (“Claims”). CONSULTANT will bear all losses, costs, damages, expense and liability of every kind, nature and description that arise out of, pertain to, or relate to such Claims, whether directly or indirectly (“Liability”). Such obligations to defend, hold harmless and indemnify the DISTRICT shall not apply to the extent that such Liability is caused by the sole negligence, active negligence, or willful misconduct of the DISTRICT.

- c. **General Indemnity Requirements.** Regardless of what type of indemnity obligation is found to apply, with respect to third party claims against the CONSULTANT, the CONSULTANT waives any and all rights of any type of express or implied indemnity against the Indemnitees.

However, notwithstanding the foregoing, in accordance with California Civil Code Section 1668, nothing in this Agreement shall be construed to exempt the DISTRICT from its own fraud, willful injury to the person or property of another, or violation of law. In addition, and notwithstanding the forgoing, to the extent this Agreement is a “construction contract” as defined by California Civil Code section 2783, as may be amended from time to time, such duties of CONSULTANT to indemnify shall not apply when to do so would be prohibited by California Civil Code Section 2782.

8. **Compensation:** DISTRICT agrees to pay CONSULTANT by (a) on a time and materials, not-to-exceed fee basis pursuant to the CONSULTANT’S Fee Schedule, attached hereto as Exhibit “B” and made a part hereof; or (b) by lump sum payment basis, as agreed upon and shown in each approved Task Order. Total compensation paid for a given Task Order shall not exceed the not-to-exceed value authorized in said Task Order without the written approval of the General Manager or Purchasing Agent.

CONSULTANT’S statement of charges shall be submitted monthly as the work progresses. Each invoice shall include reference to the Task Order Number and Project name, description of the services rendered and referenced to the task number(s) in the task-cost spreadsheet; list of labor classifications employed during the invoiced pay period, including labor and other direct costs; estimate of percent project complete based on actual completion of project milestones and other project management criteria as opposed to amount of budget spent; and listing of total authorized fee amount, current invoice amount, amount invoiced to date, and fee balance remaining. Payment will be made within thirty (30) days after receipt of such statement.

9. **Additional Services:** In no event shall CONSULTANT be entitled to compensation for additional services associated with a Task Order unless a written authorization or change order describing the work and payment terms has been executed by General Manager or Purchasing Agent prior to the commencement of the work. In the event that no rate or charge is listed for a particular type of extra work, CONSULTANT shall be paid for the extra



## Appendix C -NAPA SANITATION DISTRICT

### PROFESSIONAL SERVICES AGREEMENT (AGREEMENT)

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work at the rate to be mutually agreed on prior to commencement of the extra work.

10. **Time for Completion:** Unless the time is extended in writing by DISTRICT General Manager or Purchasing Agent, CONSULTANT shall complete all services covered by this Agreement no later than the Completion Date specified in individual Task Order, but in no case, later than the termination date specified, unless an extension to this agreement is executed by the General Manager or Purchasing Agent.
11. **Documentation:** CONSULTANT shall furnish to DISTRICT project status reports, task specific deliverables and other information as specified in the Task Order and associated change orders.
12. **Ownership of Documents:** All materials and records of a finished nature, such as final plans, specifications, and reports prepared or obtained in the performance of this Agreement, shall be delivered to and become the property of DISTRICT. All materials of a preliminary nature, such as, sketches, preliminary plans, computations and other data, prepared or obtained in the performance of this Agreement, shall be made available, upon request, to DISTRICT at no additional charge and without restriction or limitation on their use. However, reuse of such materials by DISTRICT on any other project shall be at sole risk of DISTRICT and without liability of CONSULTANT.
13. **Record Retention:** Except for materials and records delivered to DISTRICT, CONSULTANT shall retain all materials and records prepared or obtained in the performance of this Agreement, including financial records, for a period of at least three years after CONSULTANT'S receipt of the final payment under this Agreement. Upon request by DISTRICT, CONSULTANT shall make such materials and records available to DISTRICT at no additional charge and without restriction or limitation on their use. CONSULTANT shall also make such materials and records available to authorized representatives of the state and federal governments at no additional charge.
14. **Termination by District:** At its option, DISTRICT shall have the right to terminate this Agreement at any time upon 30 days written notice to CONSULTANT, whether or not CONSULTANT is then in default. Upon such termination, CONSULTANT shall, without delay, deliver to DISTRICT all materials and records prepared or obtained in the performance of this Agreement, and shall be paid, without duplication, all amounts due for the materials, equipment, and services rendered up to the date of termination.
15. **Abandonment by Consultant:** In the event that CONSULTANT ceases performing services under this Agreement or otherwise abandons the project prior to completing all of the services described in this Agreement, CONSULTANT shall, without delay, deliver to DISTRICT all materials and records prepared and obtained in the performance of this Agreement, and shall be paid for the reasonable value of the services performed up to the time of cessation or



## Appendix C -NAPA SANITATION DISTRICT

### PROFESSIONAL SERVICES AGREEMENT (AGREEMENT)

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abandonment, less a deduction for any damages or additional expenses which DISTRICT incurs as a result of such cessation or abandonment.

16. **Dispute Resolution:** The parties agree in good faith to attempt to resolve amicably, without litigation, any dispute arising out of or relating to this Agreement. In the event that any dispute cannot be resolved through direct discussions, the parties agree to endeavor to settle the dispute by mediation. Either party may make a written demand for mediation, which demand shall specify the facts of the dispute. The matter shall be submitted to a mediator mutually selected by the parties. The mediator shall hear the matter and provide an informal non-binding opinion and advice in order to help resolve the dispute. The mediator's fee shall be shared equally by the parties. If the dispute is not resolved through mediation, the matter may be submitted to the judicial system.
17. **Compliance with Laws:** CONSULTANT and any of its subconsultants and subcontractors shall comply with all laws and regulations applicable to the performance of the work hereunder, including but not limited to, the California Building Code, the Americans with Disabilities Act, and any copyright, patent or trademark law. CONSULTANT's Failure to comply with any law(s) or regulation(s) applicable to the performance of the work hereunder shall constitute a breach of contract.
18. **Patents and Copyrights:** The issuance of a patent or copyright to CONSULTANT or any other person shall not affect DISTRICT'S rights to the materials and records prepared or obtained in the performance of this Agreement. DISTRICT reserves a license to use such materials and records without restriction or limitation, and DISTRICT shall not be required to pay any additional fee or royalty for such materials or records. The license reserved by DISTRICT shall continue for a period of fifty years from the date of execution of this Agreement, unless extended by operation of law or otherwise.
19. **Assignment and Subcontracts:** This Agreement shall not be assignable or transferable in whole or in part by CONSULTANT, whether voluntarily, by operation of law or otherwise; provided, however, that CONSULTANT shall have the right to subcontract that portion of the services for which CONSULTANT does not have the facilities to perform so long as CONSULTANT notifies DISTRICT of such subcontracting prior to execution of this Agreement. Any other purported assignment, transfer, or subcontracting shall be void.
20. **Markup Allowances:** The DISTRICT recognizes the risk and liability borne by the CONSULTANT when accomplishing a portion of the work through Sub-consultants. In recognition of this risk, DISTRICT will allow the CONSULTANT a markup on Sub-consultant costs. This markup shall not exceed 5%.



## Appendix C -NAPA SANITATION DISTRICT

### PROFESSIONAL SERVICES AGREEMENT (AGREEMENT)

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21. **Heirs, Successors and Assigns:** Except as provided otherwise in Section 18 above, that this Agreement shall inure to the benefit of and bind the heirs, successors, executors, personal representatives, and assigns of the parties.
22. **Consultant Entitled to Rely:** CONSULTANT shall be entitled to rely upon the accuracy of data and information provided by DISTRICT or others known by DISTRICT without independent review or evaluation.
23. **Indemnity/Additional Insured Requirements for Construction Contract Documents:**  
For any construction contract documents prepared by CONSULTANT for DISTRICT,  
  
CONSULTANT shall include the following items:
- a. DISTRICT requires that any Construction Contractor performing work in connection with the project for which CONSULTANT is providing professional services, hold harmless, indemnify and defend DISTRICT, CONSULTANT, their Consultants, and each of their directors, officers, agents, employees, and designated volunteers from any and all liability, claims, losses, damages and costs, including attorney's fees arising out of or alleged to arise from the Construction Contractor's performance of the work described in the construction contract documents, but not including liability that may be due to the sole negligence of the DISTRICT, CONSULTANT, their consultants, or their directors, officers, agents, and employees.
  - b. DISTRICT requires Construction Contractor(s) to provide Workers' Compensation insurance in accordance with statutory requirements and Employers' Liability insurance with the limits of not less than \$1,000,000.00. The policy shall be endorsed to provide that the insurer waives any right of subrogation it may acquire against DISTRICT, its directors, officers, agents, and employees by reason of any payment made on account of injury, including death resulting therefrom, sustained by any employee of the insured.
  - c. The Construction Contractor will be required to provide Commercial General Liability insurance, including Completed Operations and Contractual Liability insurance, with the latter coverage sufficient to insure the Construction Contractor's indemnity, as above required; such insurance shall include DISTRICT, CONSULTANT, their consultants, and each of their directors, officers, agents, employees, and designated volunteers as additional insureds.
24. **Consultant's Opinion of Probable Construction Costs:** Any Opinion of the Construction Cost prepared by CONSULTANT represents his judgment as a design professional and is supplied for the general guidance of DISTRICT. Since CONSULTANT has no control over the cost of labor and material, or over competitive bidding or market conditions, CONSULTANT does not guarantee the accuracy of such opinions as compared to Construction Contractor bids or the actual cost to DISTRICT.



# Appendix C -NAPA SANITATION DISTRICT

## PROFESSIONAL SERVICES AGREEMENT (AGREEMENT)

24. **Asbestos and/or Hazardous Materials:** In providing its services, CONSULTANT shall not be responsible for identification, handling, containment, abatement, or any other respect, for any asbestos or hazardous material if such is present in connection with the project. In the event that DISTRICT becomes aware of the presence of asbestos or hazardous material at the jobsite, DISTRICT shall be responsible for complying with all applicable federal and state rules and regulations, and shall immediately notify CONSULTANT, who shall then be entitled to cease any of its services that may be affected by such presence, without any liability to CONSULTANT arising therefrom.
25. **Construction Contractor Responsibility for Jobsite:** For construction contract documents prepared by CONSULTANT for DISTRICT, CONSULTANT shall include the following:
- a. "The Construction Contractor shall assume full responsibility for job site conditions during the process of construction of the project, including safety of all persons and property.
  - b. The DISTRICT will provide CONSULTANT with the "District Safety Requirements" package that is to be incorporated into all construction contract documents prepared by CONSULTANT. The safety package specifies documentation to be submitted by the bidders, and supplemental submittals to be furnished by the successful Construction Contractor(s).
26. **Term of Agreement:** The term of this Agreement is from \_\_\_\_\_20\_\_\_\_ through June 30, 2020.

**APPROVED AS TO FORM:**

By: \_\_\_\_\_

John Bakker, Esq.

**APPROVED:**

**"DISTRICT"**  
NAPA SANITATION DISTRICT

**"CONSULTANT"**  
**CONSULTANT NAME**

By: \_\_\_\_\_

By: \_\_\_\_\_

Title: \_\_\_\_\_

Title: \_\_\_\_\_



**Exhibit A**

**NapaSan**

**CONSULTANT NAME - TASK ORDER No. xx**  
**Project Name (CIP #xxxxx)**

Date: \_\_\_\_\_

Issued under Professional Services Agreement dated \_\_\_\_\_ date \_\_\_\_\_.

To: Company Name

**Project Description:**

Engineering Services During Construction

**Description of Scope of Services to be performed by Consultant under this Task Order:**

See Attachment 'A' – Scope of Services

**Description of Services to be Provided by District:** See Attachment 'A' – Scope of Services

**Deliverables:** See Attachment 'A' – Scope of Services

**Consultant Project Manager:** Name, PE

**Consultant Quality Control Manager:** Name, PE

**Schedule to Perform Services:** See Attachment 'B' – Project Schedule

**Time & Materials Not-to-Exceed Cost Limit:** \$xxxxxxxxxxxxxxxxxxxxxx

See Attachment 'C' – Budget Summary

APPROVALS:

COMPANY NAME

By: \_\_\_\_\_  
Authorized Representative Date

**NAPA SANITATION DISTRICT**

By: \_\_\_\_\_  
Purchasing Agent Date

NSD Account No.: CIP xxxxxx



# Appendix D – Proposal Submission Form

## Computerized Maintenance Management Systems Software

This Proposal is submitted by:

Provider Name: \_\_\_\_\_

Representative (printed): \_\_\_\_\_

Representative (signed): \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

City/State/Zip: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

(Area Code) Telephone Number

Facsimile: \_\_\_\_\_

(Area Code) Fax Number

**It is understood by the Proposer that NapaSan reserves the right to reject any and all Proposals, to make awards according to the best interest of the District, to waive formalities, technicalities, to recover and rebid this RFP. Proposal is valid for one hundred and eighty (180) calendar days from the Proposal due date.**

Proposer \_\_\_\_\_ Date \_\_\_\_\_

Authorized Signature \_\_\_\_\_

Please type or print Name \_\_\_\_\_

# Appendix E – Addenda Receipt and Anti-Collusion

## Computerized Maintenance Management Systems Software

Please acknowledge receipt of all addenda by including this form with your Proposal. Any questions or changes received will be posted as an addendum on [napasan.com](http://napasan.com). It is your responsibility to check these sites for this information.

ADDENDUM #:	DATE ADDENDUM DOWNLOADED
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

I certify that this proposal is made in good faith and without collusion with any other proposer or officer or employee of Napa Sanitation District.

\_\_\_\_\_  
(Please Print Name)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
Title

\_\_\_\_\_  
E-Mail Address

\_\_\_\_\_  
Company Name