



REQUEST FOR INFORMATION

Title: LABOUR SCHEDULING

Reference No.: 1220-050-2016-004

(General Services)

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REQUEST FOR INFORMATION

1. INTRODUCTION

1.1 Purpose of this Request for Information

Through this RFI, the City of Surrey (the “City”) is seeking responses from Respondents (the “Respondent”) who offer goods and/or services in the Labour Scheduling market space to address problems (refer to Schedule A – Business Problem Statements for more detail). Our focus in this RFI is to consult the market, and explore potential organizational and technological solutions to meet our Labour Scheduling needs to address problem requirements, including ideas and recommendations on strategy, scope and approach.

Interested parties are invited to respond to this RFI by submitting a response (the “Response”) to the City. Responses should include ideas, information and recommendations that could result in a solution, clarification of requirements, cost-savings opportunities and the identification of potential problem areas with this initiative.

1.2 Request for Information Administration

This RFI is intended as a means of technical discovery and information gathering that could assist the City in the development of a future procurement process, or processes (i.e., RFX’s). This RFI is for planning purposes only and should not be construed as a solicitation nor should it be construed as an obligation on the part of the City to make any purchases. This RFI should not be construed as a means to pre-qualify Respondents. The City may utilize the results of this RFI in drafting a competitive solicitation.

If a subsequent competitive procurement opportunity or opportunities are issued, the City is under no obligation to advise any Respondent responding to this RFI. Respondents are advised to monitor the City website at www.surrey.ca and BC Bid website at www.bcbid.gov.bc.ca for any such opportunities, which will be open to all suppliers regardless of whether or not a response to this RFI has been submitted.

Respondents must not respond with any proprietary or confidential information as any information and/or recommendations in response to this RFI may be used by the City in determining the structure and content of any subsequent procurement opportunity, or opportunities. So please be careful not to send anything you might consider confidential.

The City reserves the right to invite additional responses from suppliers that did not respond to this RFI for any reason.

1.3 Estimated Timeline

The following is the City’s estimated timeline for this RFI:

Activity	Timeline
Issue RFI	Friday, July 15, 2016
Closing Date	Wednesday, August 31, 2016

All dates in the above timeline are subject to change at the discretion of the City.

2. INSTRUCTIONS TO RESPONDENTS

2.1 Address for Delivery

A Response should be labelled with the Respondent's name, RFI title and number. A Response should be submitted in the form as set out below.

The Respondent may submit a Response either by email or in a hard copy, as follows:

(a) Email

If the Respondent chooses to submit by email, the Respondent should submit the Response electronically in a single pdf file to the City by email at: purchasing@surrey.ca.

PDF emailed Responses are preferred and the City will confirm receipt of emails. Note that the maximum file size the City can receive is 10Mb. If sending large email attachments, Respondent's should phone to confirm receipt. A Respondent bears all risk that the City's equipment functions properly so that the City receives the Response.

(b) Hard Copy

If the Respondent chooses NOT to submit by email, the Contractor should submit one original unbound submission and one (1) copy (two (2) in total) which should be delivered to the City at the office of:

Name: Richard D. Oppelt, Purchasing Manager
at the following location:

Address: Surrey City Hall
Finance & Technology Department – Purchasing Section
Reception Counter, 5th Floor West
13450 – 104 Avenue, Surrey, British Columbia, Canada, V3T 1V8

2.2 Date

The City would prefer to receive Responses on or before August 31, 2016. The City's office hours are 8:30 a.m. to 4:00 p.m., Monday to Friday, except statutory holidays.

2.3 Inquiries

All inquiries related to this RFI should be directed in writing to the person named below (the "City Representative"). Information obtained from any person or source other than the City Representative may not be relied upon.

Name: Purchasing Manager
E-mail: purchasing@surrey.ca
Reference: 1220-050-2016-004

2.4 Addenda

If the City determines that an amendment is required to this RFI, the City's Representative will issue a written addendum by posting it on the BC Bid Website at www.bcbid.gov.bc.ca (the "BC Bid Website") and the City Website at www.surrey.ca (the "City Website") that will form a part of this RFI. It is the responsibility of Respondent to check the BC Bid Website and the City Website for addenda. The only way this RFI may be added to, or amended in any way, is by a formal written addendum. No other communication, whether written or oral, from any person will affect or modify the terms of this RFI or may be relied upon by any Respondent. By delivery of a Response, the Respondent is deemed to have received, accepted and understood the entire RFI, including any and all addenda.

2.5 No Contract

This RFI is simply an invitation for Responses (not including prices and terms) for the convenience of all parties. It is not a tender and no obligations of any kind will arise from this RFI or the submission of a Response. Respondents should note that this RFI is not a request for proposals or a formal tender call. Receipt of responses in relation to this RFI will not constitute a contract to purchase goods and/or services. No respondent shall acquire any legal rights or privileges whatsoever in relation to this project, or portion thereof, as a result of this RFI.

The City reserves the complete right to at any time reject all Responses, and to terminate this RFI process, and take no further action.

2.6 Respondent's Expenses

Respondents are solely responsible for their own expenses in preparing and submitting Responses, and for any meetings, negotiations or discussions with the City or its representatives and consultants, relating to or arising from the RFI. The City and its representatives, agents, consultants and advisors will not be liable to any Respondent for any claims, whether for costs, expenses, losses or damages, or loss of anticipated profits, or for any other matter whatsoever, incurred by the Respondent in preparing and submitting a Response, or any other activity related to or arising out of this RFI.

2.7 Conflict of Interest

A Respondent must disclose in its Response any actual or potential conflicts of interest and existing business relationships it may have with the City, its elected or appointed officials or employees. The City may rely on such disclosure.

2.8 Confidentiality

All Responses become the property of the City and will not be returned to the Respondent. All Responses will be held in confidence by the City unless otherwise required by law. Respondents should be aware the City is a "public body" defined by and subject to the *Freedom of Information and Protection of Privacy Act* of British Columbia.

Respondents to this RFI consent to the City incorporating any submitted ideas, concepts, approaches, or strategies into any planning, design, procurement, or contractual activities related to any aspect of the project without any obligation, liability, or consideration on the part of the City. The City will not be responsible for any costs incurred by any Respondent in responding to the RFI.

3. RESPONSE PREPARATION AND CONTENTS

3.1 Package (Hard Copy)

If the Respondent chooses NOT to submit by email, the Respondent should submit a submission in a particular submittal format, to reduce paper, encourage our recycled product expectations, and reduce package bulk. Bulk from binders and large packages are unwanted. Vinyl plastic products are unwanted. The City also has an environmentally-preferable purchasing commitment, and seeks a package format to support the green expectations and initiatives of the City.

Please do not use any plastic or vinyl binders or folders. The City prefers simple, stapled paper copies. If a binder or folder is essential due to the size of your submission, they should be fully 100% recycled stock.

The City seeks and prefers submittals on 100% post-consumer fibre (PCF) paper, consistent with the City's policy and the City environmental practices

Please double-side your submission.

3.2 Response Content

There is no Response form to fill out. Respondents should provide a concise and focused written response to this RFI. Respondents are encouraged to respond in the following format:

- (a) a brief Respondent profile;
- (b) include a document that explains how Respondent's goods and/or services can be used to address the business problem statements listed in Schedule A – Business Problem Statements;
- (c) include ideas, information and recommendations that could result in clarification of requirements;
- (d) identification and discussion of potential problem areas with this initiative, including cost-savings opportunities that the Respondent recommends the City consider when establishing its future business requirements;
- (e) relevance of solution – demonstrations of successful projects, case studies and best practices with other service organizations; and
- (f) any other information specific to the nature of this RFI and deemed important by the Respondent.

Respondents consent to the City incorporating any submitted ideas, concepts, approaches, or strategies into any planning, design, procurement, or contractual activities related to any aspect of the project without any obligation, liability, or consideration on the part of the City.

3.3 No Price Proposals

Respondents are specifically requested NOT to submit price proposals (other than high-level cost estimates for budget purposes) or information about the qualifications or experience of their firm or individuals in their firm. This RFI will not be used to evaluate, rank or select suppliers, nor will it be used to pre-qualify or screen Respondents for a subsequent competitive procurement opportunity, if any.

3.4 Additional Information

The City may, at its discretion, request clarifications or additional information from a Respondent with respect to any submission and the City may make such requests to only selected Respondents.

3.5 Presentations

Once the written Responses have been submitted and reviewed, the City may, at its discretion, invite some or all of the Respondents to appear before City staff to present an overview of current strategy, key organizational context, and discussion of problem statements. An opportunity will be provided to Respondents to ask questions and to discuss the RFI with City staff who are involved with this initiative.

Pre-Presentation Format:

The success of your presentation may depend on properly communicating the critical steps of your solution/s.

The City may conduct an up to 1 hour pre-presentation online meeting for you to provide an overview of your business problem statement solution/s, key organization context and other important information. The business problem statement scenarios as presented in Schedule A – Business Problem Statements are by no means all-inclusive of the requirements that may be included in a subsequent competitive procurement process.

Following this online meeting the City may provide a critique of your presentation and may also provide discussion points for your consideration.

Questions should be provided to the City Representative 24 hours in advance of the Respondent's meeting to ensure the City has time to respond to them appropriately in the call.

Note: The City reserves the right to arrange for a follow-up meeting with any Respondent whose initial presentation was sufficiently informative and indicative of more to be learned. If this provision is exercised, it is NOT to be interpreted as a short-list of preferred Respondents, rather as an opportunity for City staff to better understand a particular response.

Presentation Format (General):

The City expects the oral presentation meetings to take place as follows:

1. Introduction:

Should include, but is not limited to:

- Corporate background and relevant experience and how the problem statement scenarios fit into their business model;
- Introduction of key personnel; and
- Overview of the technical components of the solution.

2. Format:

Meetings will be scheduled on a one-on-one basis. Available time slots are limited so if a presentation is requested by the City, the City Representative will send a notification email confirming the location and time and any restrictions on numbers attending. The meetings are anticipated to take place in Surrey City Hall, Surrey, B.C.; however, other communication arrangements may be available depending on the Respondent's location.

At this time, we are anticipating 2-hour presentation sessions. We would like this meeting to be interactive and productive. The Respondent should include information that explains how its goods and services can be used to address the business problem statements listed in Schedule A – Business Problem Statements. The Respondent should refer to the section for each business problem or set of business problems to which the good or service can be applied, the Respondent should provide an explanation of how the good or service can be used to the benefit of the City in a short term (up to one-year), medium term (up to three years), or long term time scale and should also identify opportunities for immediate benefits with low capital requirements.

At the conclusion of the sessions we hope to have gathered the information we need and gained a deeper understanding on the capabilities of the marketplace and applicable service and technology trends. Further sessions may be scheduled at the City's discretion.

The City is not responsible for nor will grant any extra time for any technical difficulties / interruptions that may occur during the oral presentations on behalf of the Respondent.

The following items will be provided by the City:

- Projector and Screen
- Wired for Wi-Fi connection

During the oral presentation, additional questions of the Respondent's solution capability / functionality, other than those in support of the enclosed problem statement scenarios, may be asked by the attendees.

The City will make available certain of its personnel, consultants and advisors to participate in oral presentation meetings with the Respondents.

Presentation Guidelines:

It is important that the oral presentations follow the business problem statement scenarios included in this document. Based on the limited time for the presentations and the number of scenarios, Respondents are responsible to manage their time. The expectation is that the Respondents will complete the demonstration of the problem statement scenarios in their entirety. During the presentation, the Respondent should stipulate any steps that the solution cannot perform, and then resume with the next step.

The Respondent should make reasonable judgements about the level of detail to include, and by what process to proceed, while covering each scenario. The City expects that each problem statement scenario will be individually addressed, with the Respondent identifying the item. The Respondent should also make every effort to demonstrate items in the same order in which they appear in the problem statement scenarios. Any changes in the order of the problem statement scenarios should be indicated.

The expectation is that each Respondent will provide a demonstration of an integrated solution. The solution used in the demonstration should be the same as that included in any subsequent competitive procurement opportunity. If certain requirements described in these scenarios are provided by third-party software as part of the Respondents solution proposal, the Respondent is expected to demonstrate the third party product and so indicate during the demonstration.

At each presentation meeting, a Respondent may have such officers, directors, employees, consultants and agents of the Respondent and the Respondent team members present as the Respondent considers reasonably necessary for effective communication with the City and to fulfill the objectives of the presentation meetings provided that the City may, in its discretion, limit the number of participants at any one meeting. The City prefers that participation in presentation meetings is in person only.

To facilitate free and open discussion at the presentation meetings, Respondents should note that any comments provided by or on behalf of the City during any presentation meetings, including in respect of any particular matter raised by a Respondent or which is included in any documents or information provided by a Respondent prior to or during the presentation meeting, and any positive or negative views, encouragement or endorsements expressed by or on behalf of the City during the presentation meetings to anything said or provided by Respondents, will not in any way bind the City and will not be deemed or considered to be an indication of a preference by the City even if adopted by the Respondent.

If, for the purposes of the presentation, a Respondent wishes to rely upon anything said or indicated at a presentation meeting, then the Respondent should submit an inquiry describing the information it would like to have confirmed and request that the City provide that information to the Respondents in written form and, if such information relates to a clarification, explanation or change to a provision in this RFI, or competitive procurement process request an addendum to this RFI clarifying and amending the provision in question.

By participating in the presentation meetings a Respondent confirms its agreement with these procedures and acknowledges that the meetings are an integral part of the competitive procurement process as described in this RFI and are in the interests of all parties.

We appreciate your time and your help with our information-gathering and we look forward to hearing from you.

SCHEDULE A – BUSINESS PROBLEM STATEMENTS

The following business problem statements encapsulate the labour scheduling needs of the City, to which Responses to this RFI should be directed.

The City is seeking a solution to aid and enhance the method by which it schedules its employees. The solution(s) will complement the City's continual process of aligning the needs and priorities of the City with its workforce. It will allow the City to ensure the process meets not only our business unit requirements but also the organization's goal to provide exemplary service to our citizens.

The City has outlined below some examples of business problem statements that require further exploration and enhancement. This is by no means, an exhaustive list, rather a representation of some of the current needs of various business sections across the City. They are in no particular order of importance. Please consider these when preparing your Response. We are also seeking demonstrations of successful projects, case studies and best practices with other service organizations.

The business areas included for the initial RFI discussions were:

By-Laws, Engineering GIS, Engineering Operations, Parks, Planning & Development, Recreation, RCMP – Municipal Employees, Surrey Fire Services and the Surrey Public Library.

1. Accessibility

The City of Surrey is spread across a large geographic area with many locations and departments. Having up-to-date, accurate information readily available is key to meeting the labour scheduling needs of the City. Accessibility refers to two main factors: visibility and mobility.

Visibility:

There are various roles within the organization that require access to view, create, maintain and deliver a labour schedule to employees. Whether it is used to facilitate decisions, view staffing requirements or schedules, all of these activities require access to a centralized place for viewing the data used to deliver labour scheduling. They may also require the ability to access other systems in order to combine employee and equipment work schedules.

Mobility:

The City also needs the flexibility to access and distribute labour scheduling information using all methods possible for maximum circulation and optimal response times when seeking to fill vacancies in the schedule. Solutions should be responsive with the ability to be delivered through mobile devices.

Sample groups affected: All areas

2. Qualification Management

Employee profiles are currently managed independently by each facility and in separate systems. In order to properly fill vacant positions on a schedule, the Schedulers must know who is qualified to fill the role within their area, or other areas, if there is a need to borrow a

resource from another location. There is a need to access and maintain qualifications, training and skills for current staff in a real-time fashion so that it can be used for administering the schedule.

This is also the desire to be able to maintain skills sets, proficiency levels and specialization, achieved through work experience and on-the-job training.

- Types of service (e.g. tree trimming, backhoe operation, chain saw use)
- Facility specifics (e.g. arenas, pools, library branches, facility orientation)
- Geographic locations (e.g. North, East, South, West, town centres)
- Emergency response (e.g. wind storms, large power outages, floods)
- Events & Festival experience

Sample groups affected: Engineering Operations, Parks, Recreation, Inspectors, Surrey Public Library and RCMP

3. Leave/Absence Management

The City currently has a manual leave management process (i.e. forms, spreadsheets, etc.). The active policy requires a physical approval form be signed and tracked to regulate the process. Subsequently, there is minimal visibility into the span of leaves across a team, resource group, division or department. Nor can they see across shared resources, or, for delegated supervisors.

In order to manage the process more effectively the City must:

- provide visibility into the overall leave calendar for the designated area
- automate or streamline the leave request and approval/rejection process
- improve the call-in process associated with filling the resulting vacancy

Sample groups affected: Parks, Recreation, Engineering Operations, Engineering GIS, Planning & Development, By-Laws, Surrey Public Library.

4. Integration with Other Systems

The City is seeking to minimize time spent scheduling all of its resources, i.e. employees, equipment, vehicles. In order to improve resource utilization and avoid costly double booking and scheduling conflicts the data contained in these systems should be interfaced or integrated with the scheduling solution.

Items to be considered:

- Resource availability (ready to work vs. on leave)
- Equipment availability (operational vs. out of service)
- Maintenance schedules
- GPS data to automate route planning by examining past patterns
- Job costing through the financial management system

Sample groups affected: Engineering Operations, Parks and Inspectors

5. Tools & Processes

The City needs the ability to respond to changes to the schedule with more agility than it has today. Its current inability to do so has resulted in somewhat ineffective reactions to real-time changes to staffing requirements. Schedulers are also not able to proactively respond to overarching issues such as high absenteeism, excessive overtime, or employee work-life balance preferences.

Complementary processes in other departments such as recruitment and scheduled equipment maintenance also have an impact on scheduling. There is a need to review current overlapping processes to view how they can be optimized.

Sample groups affected: All areas

6. Reporting

Since the City's current scheduling activities are primarily performed using spreadsheets or disparate systems that do not align to one another, they do not have the ability to use this data to make decisions. Access to the data at the individual, departmental, and organizational levels will assist with:

- employee availability and capacity checking
- generating daily resource requirements based on staffing minimums
- reducing time spent on holiday scheduling, shift trading and unplanned absence
- cost modeling/what if scenarios to plan different types of rotations
- staffing baselines to be used for self-scheduling

Sample groups affected: All areas

NOTE: The City reserves the right to update this document with additional details/scenarios prior to the oral presentation [date]. Any additions/revisions will be posted as an Addendum on the BC Bid and City websites.