1. **Introduction:**

The Washington Metropolitan Area Transit Authority (METRO) seeks industry information about commercial off-the-shelf software products for contract assembly and contract management systems, and to identify qualified firms interested in providing and assisting with the implementation of the system(s). Specifically, METRO is interested in a contract assembly and control management system(s) (CAMS) to assist with the creation of solicitation and contract documents, receipt and evaluation of offers, contract award, administration and management of METRO solicitations and contracts.

2. **Objective:**

To obtain information about a commercial off-the-shelf product, requiring minimal configuration, if necessary, to meet METRO’s specific needs outlined in the Scope of Work.

3. **Background and Scope of Work:**

Various aspects of the METRO procurement process are not currently automated. However, METRO has implemented PeopleSoft as the Enterprise System throughout the Authority and Novell GroupWise is the authorized electronic email system. There is the possibility that any potential software will need to interface with PeopleSoft and Novell GroupWise. The contractor shall provide an electronic/online system(s) to manage the preparation of solicitation and contract documents, receipt and evaluation of offers, contract award, administration and management of procurement actions. The system shall ensure the use of standardized and authorized contract forms/templates and boilerplate contract language (e.g., solicitation provisions and contract clauses), with flexibility to allow for alternative approaches and methods of solicitation and contract administration. The system must allow for automatic routing of required reviews and approvals.

The chart below is a general overview of the typical items that influence METRO procurement activities. This is not all inclusive, but serves as background information. In addition to METRO’s procurement policies and procedures, the Federal Acquisition Regulations (FAR) are used as a guide.
| Source Selection Methods | Competitive Sealed Bidding;  
|                          | Competitive Sealed Proposals ("Best Value" and  
|                          | Lowest Price Technically Acceptable process;  
|                          | Sole Source Procurement ;  
|                          | Emergency Procurements;  
|                          | Procurement Through Federal and Other Governmental  
|                          | Sources (e.g., GSA);  
|                          | Architectural and Engineering Services (i.e. Design-  
|                          | Build varieties) |
| Type of Contracts        | Firm Fixed Price; Incentive; Indefinite Delivery; Time  
|                          | and Material; Labor Hour; Cost Reimbursement; Multi-  
|                          | Year; Letter; General Services Administration (GSA) |

| Traditional Solicitation /  
| Contract Table of Contents: | Invitation for Bids/ Request for Proposals:  
|                             | Solicitation Instructions  
|                             | General Provisions  
|                             | Special Provisions  
|                             | Special Conditions  
|                             | Technical Specifications/Scope of Work  
| Appendices:                 | Appendix B (DBE)  
|                             | Davis Bacon Labor Wages  
|                             | Drawings  
|                             | METRO Publications  
|                             | Safety Manual |

The system or modules needed shall perform or have the capabilities to perform the actions outlined below:

**Solicitation Preparation:** Control the terms and conditions included in new contracts and contract modifications generally based on funding source, requirement categories, method of solicitation, and type of contract.

**Document Assembly:** Control and standardize contract creation for multiple contracting offices using a response driven system similar to a popular tax preparation system (TurboTax).

**Solicitation Advertising:** Capability to post to an online web site (including METRO's website) a summary about the upcoming solicitation (solicitation number, brief description, and name and telephone number of Contract...
Administrator) sufficient for prospective bidders/offerors to determine whether they have an interest in participating in this procurement.

**Receipt of bids/proposals:** Capability for bidders/offerors to respond online to solicitations using built-in formats or templates, with those responses automatically forwarded to a secure electronic mailbox designated for proposals/correspondence relating to that solicitation.

**Evaluation of Proposals:** Assist contracting officers and source selection teams with the evaluation of proposals by permitting online evaluations through structured and secure forms; recording adjective ratings (e.g., exceptional, acceptable, marginal and unacceptable) based on the source selection criteria entered into the system.

**Award:** Record the contracting officer’s determination that the contractor is responsible prior to award. Document the award, compile the award documents and send the contract documents electronically to the winning contractor.

**MISCELLANEOUS REQUIREMENTS:**

**Routing:** Send automatic internal email notifications (simultaneously or sequentially) based on specific milestones (e.g., pre-bid/conference date, offer submission date, contract nearing expiration, insurance nearing expiration, contract reassignment to a new Contract Administrator, Project Manager or COTR, etc.)

**Monitoring and Measuring:** At any point throughout the solicitation phase and contract administration cycle, the system(s) must monitor, measure, and provide real-time status to management and customers as to the status of the pending procurement action.

**Reports:** The system(s) must also be capable of creating and updating a variety of standard reports on pre- and post-contract award activity and information (e.g., procurement activity lead time; description and funding source; type of contract; method of solicitation; date and time offers/bids are due; number of offers/bids received; tracking method for late offers/bids; name of offerors/bidders and firm awarded the contract; date of Board approval, award, and NTP; associated Board Resolutions; information about task orders and contract modifications issued; contract expiration and close out date; name of the Contract Administrator, Contracting Officer, Project Manager, COTR; etc.).

**System Audit Trail and Maintenance:** The system(s) must be capable of tracking revisions made to standard or approved system-created documents and contract terms and conditions. It must catalog, number, and identify the item creation or
revision date, and easily populate updates or revisions to all applicable contract templates, forms, and solicitation provisions and contract clauses.

4. **Authority Furnished Property:**

   The Authority will make available a sample solicitation document that interested parties can use when preparing a demonstration of their software product(s). The sample solicitation is simply to assist in determining whether a commercial product is available to meet WMATA’s needs.

5. **Structure of EOI:**

   Expressions of Interest shall be no more than 10 pages in addition to the submitting the firm’s standard informational or promotional literature. The submission must be clearly marked “EOI - Contract Assembly and Contract Management System” and should include cost and frequency of upgrades, maintenance and support, cost and frequency of licence requirements, discounts offered and Commercial catalog or descriptive literature.

   Firms are encouraged to provide additional comments and suggestions relative to the project scope and methodologies. List your GSA Schedule number, if applicable.

   The EOI should contain a profile of the firms’ experience in successfully providing this type of supplies and service to large private sector, governmental and other organizations.

6. **Submission Date and Contact Person:**

   Questions concerning this request should be submitted in writing to Teresa Scott, Contracting Officer, Office of Procurement and Materials, at the street or e-mail address listed below by 2:00 p.m. June 21, 2007.

   Teresa Scott, Contracting Officer, PRMT, Room 3B-08
   Washington Metropolitan Area Transit Authority
   600 5th Street, NW
   Washington, DC 20001
   Email: tscott@wmata.com
Interested firms should submit 1 original and 2 copies of EOI outlining their experience in providing requested software and services by June 29, 2007, to:

Brij M. Malhotra, Contract Administrator, PRMT, Room 301-B
Washington Metropolitan Area Transit Authority
600 5th Street, NW
Washington, DC 20001
Email: bmalhotra@wmata.com