

CITY OF CHATTANOOGA PURCHASING DEPARTMENT
101 EAST 11th STREET, CITY HALL, SUITE G-13
CHATTANOOGA, TENNESSEE 37402

Request for Proposal No.: 182277

Ordering Dept.: 311 Call Center

Buyer: Deidre Keylon; email: RFP@CHATTANOOGA.GOV (NO E-MAILED PROPOSALS ACCEPTED)

Phone No.: 423-643-7230; Fax No.: 423-643-7244

Goods/Services Being Purchased - Subject: **CRM Software Solution for 311 Call Center**

**SEALED PROPOSALS MUST BE SUBMITTED AND RECEIVED AS SPECIFIED FOR
TIME-STAMPING NO LATER THAN 4:00 P.M. E.S.T. ON MARCH 27, 2019;
ALL QUESTIONS MUST BE RECEIVED IN WRITING AS SPECIFIED AND
NO LATER THAN 4:00 P.M. E.S.T. ON MARCH 8, 2019**

The City of Chattanooga reserves the right to reject any and/or all proposals, waive any informalities in the proposals received, and to accept any proposal which in its opinion may be for the best interest of the City. The City of Chattanooga will be non-discriminatory in the purchase of all goods and services on the basis of race, color or national origin.

The City of Chattanooga (COC) Terms and Conditions posted on Website are applicable:
<http://www.chattanooga.gov/purchasing/standard-terms-and-conditions> (Revised_7.18.2018.pdf)

All proposals received are subject to the terms and conditions referenced, above. The undersigned Offeror acknowledges having received, reviewed, and agrees to be bound to these terms and conditions, unless specific written exceptions are specifically listed within Offeror's sealed proposal. Proposed exceptions received after the date of submission may be a basis for disqualification.

NOTE: ALL PROPOSALS MUST BE SIGNED and have ON THE LABEL the (1) Vendor Name and Address, and (2) "RFP 182277 CRM Software Solution for 311 Call Center."

PLEASE PROVIDE THE FOLLOWING:

Company Name: _____

Mailing Address: _____

City & Zip Code: _____

Phone/Toll-Free No.: _____

Fax No.: _____

E-Mail Address: _____

Contact Person: _____

Signature: _____

Date: _____

COMPLETED AND SIGNED COVER PAGE MUST BE RETURNED WITH PROPOSAL

Request for Proposals

CRM* Software Solution for 311 Call Center

*CRM is Citizen (Customer) Relationship Management

**City of Chattanooga, Tennessee
Department of Information Technology**



This request solicits proposals from qualified suppliers to furnish the municipal government of Chattanooga, Tennessee, with a Citizen Relationship Management software solution for the 311 Call Center.

INTRODUCTION

This request solicits proposals to furnish the municipal government of Chattanooga, hereinafter referred to as “The City”, with a Citizen Relationship Management software solution, hereinafter referred to as “CRM software solution.” Specifications describing the functional and technical requirements of the CRM software solution can be found in this document. It is The City’s intent to select the most suitable solution based on responses to this RFP.

This request solicits proposals with recommendations made to the City in five areas:

- (1) CRM software solution
- (2) Implementation services for recommended solution
- (3) Hardware and hosting services
- (4) Migration of legacy CRM data
- (5) Replacement of software interfaces with The City’s current departmental work management software solutions (Cityview & Cityworks)

The City’s 311 Call Center has been in operation since 2002 serving a city population of approximately 175,000 and a region of approximately 400,000. The Call Center operates from 8:00 am to 6:00 pm with a staff of twelve Citizen Service Representatives, a Customer Service Supervisor, and a 311 Customer Service Manager. With this RFP, The City is seeking an upgrade or replacement for the Accela CRM software solution that was implemented by The City in 2015. The goal of this project is to improve service to the citizens of Chattanooga as well as the internal departments served by 311.

For cost comparison purposes, the prospective vendor must include an itemized cost schedule in their response along with all maintenance, subscription, and support costs based on information provided in this RFP. The potential vendor will also be required to provide a single project manager for all proposed project phases.

The successful vendor can expect to perform discovery sessions once the project begins in order fully understand The City's operating environment and specific needs with regard to implementation of a CRM software solution.

POTENTIAL CONTRACT TERM

Any resulting contract will be a Blanket Purchase Order contract, with an initial contract term of one (1) year, with two (2) additional optional one-year renewal terms at the agreement of both parties and using the same Terms and Conditions. The City solely determines the number of contracts awarded, if any.

Any resulting contract will not be considered exclusive or a requirements contract. There is no guarantee of any minimum or maximum purchase or usage through any awarded Blanket Contract, nor any guarantee of proportional usage among any potential multiple awarded Blanket Contracts (if applicable).

SCOPE OF WORK

The purpose of this section is to describe the required and desired features of a CRM software solution for The City. The vendor may propose additional features and options to be considered. The sequence in which the following items appear in this document does not represent any priority of importance for this proposal. The City requests that prospective vendors use these specifications to develop proposals.

Functional Requirements

The 311 Call Center is a one-call citizen service line. Citizens call 311 for non-emergencies that do not involve a crime in progress or an immediate threat to life, bodily injury, or major property damage or loss.

The CRM software solution should support The City's centralized 311 Call Center by facilitating the input of non-emergency service requests across platforms, including: voice, email, internet, mobile devices and walk-ins as well as enable subsequent

follow-up communication with citizens. The City's centralized call center staff members rely on computerized tracking of service requests from the initial call through its transmission to the receiving department, assignment and completion of the service request, and request close-out to provide prompt, friendly responses to citizens' requests for service or information.

A key functional component of information transfer is the automated progress tracking of a service requests. This status should be reflected accurately in all relevant systems in a real-time and dynamic fashion.

The CRM software solution must allow for request entry by other city departments that process citizen requests.

Specific functional requirements include:

1. Record all service request details in a centralized database application.
2. Application should be user friendly (citizen and staff) when submitting requests.
3. Functionality should intuitively select the appropriate department that would best resolve a request based on its type or category.
4. Solution should allow for completion of flex questions associated with particular service requests.
5. Solution should validate the service location as an accurate City of Chattanooga street address. The address data to be sourced directly from Hamilton County's ESRI SDE or a version of the SDE managed by The City. Address updates should be automatically reflected in the recommended software solution.
6. Solution should have options to use an intersection as an address.
7. Solution should reject any request for service that falls outside the City of Chattanooga limits and automatically alert the requestor as to the reason for the rejection.
8. Solution should provide notification when multiple requests are being entered for the same address.
9. Track requests for information which do not result in departmental service requests.
10. The ability for citizen/agency requestors to submit requests in bulk.
11. The ability for staff to submit requests in bulk copying general information from one request to another request.
12. The ability for staff to close multiple requests in bulk at the same time.

13. The ability for staff to close requests from other departments (only if it is a transfer).
14. The ability for staff to see multiple requests at the same address at one time.
15. The ability for staff to have multiple applications open at one time.
16. Easily retrieved or viewable status and resolution details of service requests for 311 Operators or citizens.
17. The ability to attach multiple files at one time to requests.
18. The ability to copy citizen information when entering multiple requests for same address/citizen.
19. Communication to citizen requestors confirming the request submission, closing out the request, and providing a means for survey or evaluation by the citizen (Citizen Notification to and from City).
20. Solution should have specific status confirmation of the request (in process, scheduled, complete, etc).
21. Maintain a customer service knowledge base to provide 311 call center agents with an online reference and policy library to ensure consistency of information.
22. Provide a variety of statistical reports upon request for City administrators. Reports should have the option to be viewed by geographical area, department hierarchy, type of request, request method (i.e. phone, email, web, walk-in, etc.) and other common data points.
23. Solution should provide search/research capabilities when looking for previously submitted requests.
24. Solution should provide a public and private notes section for documentation.
25. Solution should track use of inventory for request/job (trucks, supplies, labor, equipment and materials).
26. Solution should track serial numbers for garbage and recycle containers.
27. Solution should populate garbage/recycle day when address is entered in request.
28. Provide a consistent data interface with other existing service request and work order software used in various departments in The City.
 1. Meet current functionality or improve interface solutions already in operation. Currently existing interfaces create both inbound and outbound transfers including: Azteca Cityworks for the Public Works Department and Municipal Software Cityview for the Neighborhood Services Department.
 2. Provide continued support for each interface provided.
 3. Provide ability for additional interfaces for other software applications if needed in the future.

29. Provide the customer service knowledge base as a searchable Web-based self-service portal to help citizens answer their own questions and find the status of their requests.
30. Provide citizens with the ability to report problems and the geographical location directly from mobile devices.
31. Provide citizens with the ability to report problems using a text message option.
32. Provide citizens with the ability to report problems using a live chat option.
33. Provide citizens with the ability to report problems using an email option.
34. Provide citizens with the ability to report problems using social media.
35. Provide citizens with a web-based self-service retrieval of historical service request and status information based on geographical location without compromising the identity of the original requestors.
36. Notify selected personnel when requests become overdue or have incomplete follow-up within specified time frame.
37. Technical Support Options
38. Other features and functions found in “best of class” call center services.

Technical Requirements

All proposed software configurations should reference a standard production release of the recommended software solution as of the vendor response date. The City desires to implement a hosted and managed solution that meets a minimum up time and performance standard to be contractually agreed upon.

Telephony integration

The 311 Call Center currently operates on an EPB Fiber Optics telephony network. Potential vendor solutions must be compliant with EPB Fiber Optics.

All associated hardware should be available from popular vendors and require no specialized configuration or additions to run the proposed application. The City reserves the right to purchase all recommended computing hardware and associated licensing or installation independent of this RFP.

The City prefers a hosted solution supported by the vendor.

Software Standard Requirements

The items set forth below are intended to be informational and provide a minimum list of expected requirements for any software product. It is not exhaustive and is not intended to serve as a contract or a replacement for or exhibit to the City Purchase Order Standard Terms and Conditions. It would be expected that the items on this checklist would be incorporated into a contract or exhibit to the City's Standard Terms to be agreed upon and signed by the contracting parties.

Definitions

- **API:** Application Program Interface; functions and procedures available to developers by which certain software functions may be automated.
- **COTS:** Commercial, Off-the-Shelf software. This refers to software packages by the City of Chattanooga as opposed to custom software written for the City of Chattanooga (either by a vendor or Applications Development).
- **Geocoding:** A method by which a street address is converted to information for mapping or other geolocation purposes.
- **LTS:** A Long-Term Support version of a given software package. Vendors sometimes alternate between LTS and non-LTS version; LTS should be selected for enterprise use in most cases.
- **No SQL:** A non-relational DBMS. This format is increasing in popularity at the time of this writing.
- **SME:** Subject-Matter Expert; an end-user that is exceptionally well versed in a particular software package, prepared for and available to provide guidance to his or her peers.

Purpose

This document should serve as a guide for the selection, purchase, and implementation of Commercial Off-the-Shelf (COTS) software, as well as any custom software developed for or by the City of Chattanooga.

Scope

This procedure applies to all DIT staff who make decisions with regard to the purchase of COTS software, and DIT partners who seek to purchase and use COTS software. Likewise this applies to custom-developed software created for or by the City of Chattanooga

Responsibility

Any City of Chattanooga staff member, whether a member of the DIT or not, who is involved in the decision-making process for the purchase and selection of COTS software or custom-developed software created for or by the City of Chattanooga.

Policy

- Business Rules

Users should be able to create, read, update and delete data for the purpose of business licenses.

- Database Systems:

COTS software must use an approved Database Management System (DBMS) from the following list, based upon what is currently in use at the City of Chattanooga and what is regarded as acceptable industry-wide for enterprise use: Microsoft SQL Server, Oracle MySQL/MariaDB, PostgreSQL, NoSQL (MongoDB/Cassandra).

- Data:

- Data Access:

- Legacy data from existing, Accela-Automation system must be migrated into new PS system. All fields pertaining to trade licenses, permits and inspections must be mapped and copied over to the new PS. This migrated data should be searchable by permit number, date range or address.
- Vendor must provide an industry-standard method of accessing stored database information:
- Vendor must provide documentation of methods;
- Vendor must provide reasonable support for said methods.

- Data Ownership:

- Data belongs to the City.
- Provider does not acquire any rights or licenses to use the data for its own purposes by virtue of the transaction.
- Provider is obligated to return the City's data in both the Provider's format and in a platform-agnostic format.

forms of technical support.

- Functional Support
 - Vendors should provide access to an online user community supported by and/or participated in by vendor representatives;
 - Vendor must provide an avenue for functional support, whether through said vendor or an approved third-party.
- Maintenance:
 - Vendor to provide patching schedule and version upgrade roll out;
 - Standard managed services.
- Training:
 - Vendor Commitment:
 - Vendor to provide training material for all software versions;
 - Vendor should provide release notes for new versions or patches including pushed notifications for security related fixes.
 - Vendor to provide at minimum “train the trainer” sessions during initial installation and as needed after major upgrades.
- City Departmental Partner Commitment:
 - Sponsoring partner must designate an appropriate number of SMEs (based upon planned user base);
 - Partner shall provided for initial and ongoing training of said users including, but not necessarily limited to:
 - In-person, instructor-led online, or CD/DVD based-training;
 - Periodic attendance of user groups and conferences.
 - Partner shall name replacements and/or new SMEs when necessary and provide for their training.
 - Sponsoring partner must provide for and agree to an internal methodology by which end-users may contact SMEs for education and issue resolution.
 - Sponsoring partner must designate one or more SMEs to act as liaisons to vendor support if required by vendor.

Cloud/Hosted Solution Standards

The items set forth below are intended to be informational and provide a minimum list of expected requirements for any cloud-based product. It is not exhaustive and is not intended to serve as a contract or a replacement for or exhibit to the City Purchase Order Standard Terms and Conditions. It would be expected that the items on this checklist would be incorporated into a contract or exhibit to the City's Standard Terms to be agreed upon and signed by the contracting parties.

User Licenses

- Specify the quantity of licenses provided to cover the number of users.
- User license types (Concurrent or Seat).
- Renewal options (Subscription or Maintenance).
- Are user licenses transferable?

Service Level Agreements

- Identify the amount of guaranteed "uptime".
- Describe the process and timeline for dealing with "downtime".
- Describe the consequence for any failures (including credits, etc.).
- Notification process of outages and resolution.
- Service package offerings for support (Silver, Gold, Platinum).
- Patch testing to be performed in Test environment with designated City Staff for sign-off and approval.

Data Management

- Data to be hosted and managed by Provider.
- If Test environment is provided - must be maintained and kept current with production.
- What options are available for pulling and pushing data (API, Web services, Database access)?

Ownership of Data

- Data belongs to the City.
- Provider does not acquire any rights or licenses to use the data for its own purposes by virtue of the transaction.

- Provider is obligated to return the City's data in both the Provider's format and in a platform-agnostic format.
- Provider does not acquire or may not claim any security interest in the data.

Data Retention

- Provider to retain all City data consistent with City Retention requirements and all local, state and federal laws.
- Provider to destroy all City data on provider's server within thirty (30) days of written request by the City.

Location of Data

- Location and process that the data is stored and backed up.
- Backup should be stored in multiple physical locations for disaster recovery purposes

Certifications for specific information types

- Provider to produce any required certification for specific data/information types (e.g. PHI, CJI, etc.).
- Provider to identify any special requirements or restrictions for particular information (cont.) or data types (e.g. if a separate agreement must be entered to store PHI).

Data Accessibility

- Vendor should provide a methodology by which the City can access the data via scheduled ETL (extract, transform, and load) processes.

Data Security

- Provider to specify the specific independent security standard utilized by the Provider.
- Provider to provide an audit (SAS70/Type II audits).
- IT to obtain and review the appropriate audit report before contracting.
- Provider to provide notice of security/data breaches immediately upon learning of such a breach. This notification is in addition to any breach notification requirements set forth in local, state or federal law. How will notifications be provided?
- Logging capabilities that will be available.

Emergency Security Issues

- Describe the objective standard that applies to emergency suspension of services and include a materiality component or similar threshold.

Data Privacy

- Provide the privacy policy that describes the different types of information collected; how it is used, disclosed, and shared; and how the provider protects the information.

Data Encryption

- Provide the encryption of data in both transmission and storage (“at rest”) and explain the encryption standards applied.
- Provide the level of encryption.

Data Redundancy

- Explain the data backup practices, including the frequency of the data backup as well as ongoing access to the data or the delivery of such data to the City.
- Provide any redundant paths.

Data Conversion

- Provider to identify whether any data conversion must take place in order to make the software available to the City and at termination of the agreement in order to return data to the City.
- Provider to provide cost estimates for any hourly rates that may apply to such conversion.
- The cost of any initial data conversion must be included in the initial fee schedule or invoice.
- Conduct appropriate testing to verify the simplicity of the provider’s mapping scheme.

Cyber Security Insurance

- Provider to identify whether it carries cyber security insurance.
- Provider to add the City as an additional insured to any cyber security policy and provide a certificate of insurance naming the City as an additional insured.

Electronic Discovery (e-discovery)

- Identify the format in which data will be produced in the event of a discovery request.
- Identify tools are available to access City data in the event of an e-discovery need.

Suspension of End User Accounts

- Suspension of end user accounts for violations of AUP or terms of service are limited to material violations or violations that significantly threaten the security or integrity of the Provider’s system. With “material” and “significant” to be clearly defined.

Suspension and Termination of Service

- Provider to identify the events or conditions that would allow for suspension or termination of

services

- Provider must provide a minimum 60 days advance notification of suspension and termination of services.
- Provider must identify the basis for the suspension or termination.
- Provider must give adequate time for the City to make arrangements for migration of its data and the identification of a new service provider.
- Provider must ensure the data remains available to the City, in a usable format, for a specified period of time following a termination.
- Regardless of the reason for the termination, Provider must return the data to the City in an agreed upon format within 30 days of termination.
- If suspension is due to Provider fault, no payment will be made for the period of suspension or Provider will credit the City for any days when the service is suspended.

Warranty

- Provider to warrant that the service conforms to and will perform to in accordance with its specifications and that it does not infringe on any third-party intellectual property rights.

Incorporation of URL Terms

- While it may be reasonable to deal with technical standards and guidelines or other “non-legal” matters elsewhere, all legal terms must be included in the contract itself or attached as an Exhibit.
- Provider must provide direct, individual notice sufficiently in advance of the effective date of any amendments to incorporate terms, along with the right to terminate if such amendments are unacceptable or materially detrimental to the City’s interests.

Administrative and Contractual Information

General Instructions to Proposers

Package Labelling and RFP Due Date/Time

Sealed Proposals must be in a clearly labelled package (a non-transparent envelope or box) and submitted as otherwise specified to the Purchasing Department, City of Chattanooga, for time-stamping by no later than 4:00 p.m., e.s.t., on MARCH 27, 2019, to the attention of:

Chattanooga Purchasing Dept/**RFP**
101 East 11th Street, Suite G13
Chattanooga, TN 37402

Phone number if needed:
(423) 643-7230

Late or misdirected proposals shall be rejected and offered for return at the expense of the supplier without exception. Postmarks are not accepted. E-mailed proposals are not accepted.

Clear labelling includes:

- the business name, address, and phone number on the exterior (or on the label)
- the name and number of the RFP on the exterior (or on the label)

Number and Format of Copies

Proposer shall submit three (3) complete copies of the proposal as follows: one (1) original - unbound; one (1) copy - bound; and one (1) electronic copy in PDF format on a flash drive or jump drive. Discs will not be accepted. E-mailed proposals will not be accepted.

The proposal format must be tabbed as requested under CHECKLIST OF REQUIRED MATERIALS.

Detailed Technical Proposals

Complete technical submittals shall be submitted with the Proposal. These technical submittals shall describe in detail how the Proposer complies with each specification requirement of the RFP. Any deviations from the specifications shall be noted.

Questions / Requests for Information

All questions and requests for information or clarification must be submitted in writing, and will be accepted until 4:00 pm, est, on March 8, 2019, and shall be submitted as follows:

Preferred method: email to rfp@chattanooga.gov with Subject line reading: **QUESTION FOR RFP 182277 CRM for 311 Call Center.**

Alternative method: mail or fax with clear marking on outside of package or cover sheet **QUESTION FOR RFP 182277 CRM for 311 Call Center.**

City of Chattanooga Purchasing Division
Attn: Deidre Keylon, Buyer
101 East 11th Street, Suite G13
Chattanooga, TN 37402

Fax: (423) 643-7244

All answers will be provided by addendum posted at www.chattanooga.gov, then Bid Solicitations, as soon as possible after the deadline for questions.

RFP Specifications

This RFP is intended to describe The City's minimum requirements and response format in sufficient detail to secure comparable proposals. However, vendors are not precluded from submitting proposals that recommend a solution that differs from the provided specifications as long as the required response format is followed.

Communication During the RFP Process

Any communication concerning this RFP must be conducted exclusively with the City of Chattanooga Purchasing Division Buyer, until the evaluation and award process has been completed. Failure to follow this procedure will be negatively viewed in the selection process.

Implied Requirements

All products and services not specifically mentioned in this RFP, but which are necessary to provide the full recommended solution described by the vendor, shall be included in the proposal.

Proposer-Supplied Materials - Open Records

Any material submitted by a Proposer shall become the property of the City unless otherwise requested in writing at the time of submission. **All records submitted to the City of Chattanooga with limited bases for exclusion are subject to review through the Tennessee Public Records Act. Any firm submitting a proposal should assume the information included in the proposal is subject to the Act, regardless of submitter designation.**

Issuing Office

This RFP shall be governed by the laws of the State of Tennessee and is issued by the Purchasing Department for The City.

Rejection of Proposals

The City reserves the right to reject any and all proposals resulting from this RFP.

Proposal Withdrawal Procedure

A Proposal may be withdrawn at any time until the date and time set above for opening of proposals. Any proposal not so withdrawn shall, upon opening, constitute an irrevocable offer to provide the specifications set forth in the proposal, until the successful proposal(s) is/are accepted and a contract has been executed between the City and the successful Proposer(s).

Incurring Costs

The City shall not be liable for any cost incurred by the proposer prior to the issuance of a contract purchase agreement and will not pay for the information solicited or obtained. Proposer shall not include or integrate any such expense as part of its proposal.

Economy of Preparation

Proposals shall be prepared simply and economically. Proposals shall provide a straightforward and concise description of the goods or services proposed. Emphasis should be placed on clarity and content. Lengthy or disorganized proposals may be viewed as attempts to obfuscate issues with possible negative consequences.

Conditions of Agreement

The successful vendor will be expected to enter into contract negotiations with The City that will result in a formal purchase agreement between the parties.

Terms and Conditions of Agreement

Any contract resulting from this Request for Proposal will be subject to the City of Chattanooga's Standard Terms and Conditions which may be read at:

[http://www.chattanooga.gov/images/City_of_Chattanooga - Standard Terms and Conditions Revised 7.18.2018.pdf](http://www.chattanooga.gov/images/City_of_Chattanooga_-_Standard_Terms_and_Conditions_Revision_7.18.2018.pdf)

With the Proposal, Proposers shall state any exceptions to or deviations from the terms of this Request for Proposals and the Standard Terms and Conditions. Where proposer wishes to propose alternative approaches to meeting the City's technical or contractual requirements, these should be thoroughly explained. The Contractor shall be bound to accept all stated terms not excepted in its proposal.

The City reserves the right to accept or reject any or all exceptions / deviations at its sole discretion. The City reserves the right to reject excepted or conditional proposals at its sole discretion.

Only exceptions that are specified within a solicitation response submission packet will be considered for potential negotiation by the City. Negotiation is not guaranteed.

Format Required: **Isolate and reference the specific Section of the City of Chattanooga Standard Terms and Conditions to which an exception is taken, and provide alternative language for that specific section. Do not provide a full replacement Terms and Conditions document.**

Failure to include any desired exceptions within a solicitation response submission packet may result in disqualification of a solicitation response.

Solicitation preparation or presentation costs are not compensable.

General Reservation of City Rights

The City of Chattanooga may contact any firm for the purpose of obtaining additional information or clarification.

Contract Administration Activity

The Proposer will be expected to provide periodic reporting and/or attend Contract Administration meetings, as described in this document or as otherwise required by the City Purchasing Division.

RFP Lifecycle

Introduction

The purpose of this section is to inform prospective vendors of the process that will take place as a result of this RFP. The information contained herein discloses details about dates, times, and places as they pertain to this RFP.

Response Date

Sealed proposals to be considered must arrive at the Purchasing office in time for time-stamping by no later than the time and date referred to on the cover sheet of this document.

Initial Screening

The initial screening of submitted proposals will occur as soon as practical following the opening. The initial screening process will involve evaluating all proposals for completeness, clarity, and conformity to all RFP requirements. **Proposals not meeting minimum requirements will not receive further consideration.**

For a list of required items for inclusion, see **CHECKLIST OF REQUIRED SUBMISSION MATERIALS on page 27**

Oral Presentation

Vendors submitting a proposal that passes initial screening may be invited to make an oral presentation of their proposal to The City. Invitations will be given solely at the initiative of The City for such purposes as The City deems necessary. Such presentations provide an opportunity for the vendor to clarify their proposal and ensure that a thorough, mutual understanding exists. Oral presentations are not mandatory. These presentations may be conducted in person, by web conference, or by teleconference.

Product Demonstration

Vendors may be requested by The City to demonstrate the IT Professional Services they are proposing. Demonstrations will be conducted in the most economical manner possible.

Final Evaluation

In the final evaluation, the proposals submitted by the vendors will be reviewed and a recommendation will be made by an evaluation committee for the proposal that is considered to best satisfy The City's requirements.

Any recommendation by the evaluation team or staff members is subject to review and concurrence or nonconcurrence by the Department of Information Technology and Administration. The Department of Information Technology will make a recommendation to Chattanooga City Council in the form of a resolution.

Proposal Acceptance

After the final evaluation, the chosen vendor(s) will be notified and contract discussion and negotiation between The City and the selected vendor(s) is expected to begin. The content of this RFP and the successful vendor's proposal will become an integral part of the contract.

Review and Evaluation of Proposals

All proposals submitted in response to this RFP will be evaluated by an Evaluation Committee in accordance with the criteria described below.

The City, at its sole judgment, will decide if a proposal is viable.

In preparing responses, Offerors should describe in detail how they propose to meet the specifications as detailed in this solicitation document.

The minimum categorical criteria that will be applied to the proposal information, in order to assist the City in selecting the most qualified proposer(s) for the contract, are as follows:

Evaluation Criteria

Selection of Proposers for formal presentations (if any) and for contract negotiation will be evaluated based on an objective evaluation of the criteria listed below (marked if required, and detailed by ideas for demonstration of each):

30% Competence to Perform Scope of Work

- COMPETENCE OF FIRM AND PRODUCT TO PERFORM THE SCOPE OF WORK
 - Required element: Evidence of firm's competence to perform the Scope of Work
 - Evidence of above may include:

- Firm's purpose, direction, product line, size, industry standing, accolades, personnel, organizational chart, financial stability, etc.
- Competence of team/individuals to be assigned to this project, including Project Manager
- Required element: Quality and capacity of software proposed for this SOW
 - Hardware, software, etc.
 - Proposer is expected to be familiar with any software included within or recommended in the proposal.
- Demonstrated understanding of the Scope of Work
- Demonstration of a thorough knowledge of the differences associated with municipal government Call Centers as opposed to those of the private sector with regard to all phases of call receipt, tracking, and processing.

15% Qualifications / Experience

- SPECIFIC QUALIFICATIONS AND EXPERIENCE DEMONSTRATING COMPETENCE TO PERFORM THE SCOPE OF WORK
 - Required element: firm's number of years in business providing same or similar applications
 - Required element: Team's and individuals' (those who are to be assigned to The City project) qualifications and experience to perform the Scope of Work
 - Team/individual knowledge, education, certifications - Resumes of Assigned

20% Approach to Scope of Work

- WHERE, HOW, WITH WHOM, AND WHEN WILL THE PROPOSER PERFORM THE SCOPE OF WORK IF AWARDED?
Proposers should understand that adherence to all vendor-proposed dates and timelines will become part of said vendor's contractual obligation should their proposal be selected by The City for its CRM software solution.
 - Required element: a firm timeline for initial contract year
 - Required element: a City project start date commitment in April or May 2019
 - Required element: a resource availability date commitment
 - Required element: assignment of specific personnel, including Project Manager, for initial contract year or at least through completion of implementation
 - Required element: detailed information on Proposer's "discovery" methodology
 - Required element: sample project plan
 - Service plan or summary - routine and on-demand (including optional contract years two and three)
 - Maintenance plan or summary - routine and on-demand (including optional contract years two and three)
 - Quality assurance plan (including optional contract years two and three)

- Required element: Training plan or summary
 - Proposals must include all required training of end user and support personnel required for the implementation and use of any proposed CRM software solution.
- Required element: Frequency of software updates (if applicable)
- Risk management plan (what occurs in event of system down time, for example)
- ACCESSIBILITY TO THE SYSTEM AND DATA
 - Software access for City employees
 - Software access support

25% Price / Value / Cost

For cost comparison purposes, the Proposer must include an itemized cost schedule in their response along with all maintenance, subscription, and support costs based on information provided in this RFP.

Technical Support Services

Proposals must provide all costs associated with supporting the proposed solution, including but not limited to, legacy data migration, custom development of application interfaces, and any other software development that is required to implement and host the proposed solution.

Cost Summary

Vendor must supply a line item detail to support the Proposal Cost Summary.

- The contract term is one-year with two optional one year renewals. If renewals are desired by both parties, City Council must approve renewal for both second and third year. Pricing should reflect this and not assume that three years will be purchased.
- Pricing structure disclosure (packaged products (all modules or certain modules) purchasing requirements; individual module(s) purchasing allowed, etc.)
- Itemized pricing per pricing form (enclosed) with additional lines if applicable to product(s) proposed
- Total, all-inclusive cost to City for proposed software solution (including ALL costs)
- Additional hourly options, such as Programming, if not included with Implementation, etc.
- Value to the City not seen in direct cost

10% Reference Projects

- Previous contractual performance history

- Reference Checks
Required elements (all bulleted points below):
Internet, telephone, mail, or e-mail reference checks may be performed. References not responding to requests in a reasonable number of attempts will count as reference-check attempts made. Sufficient attempts made may take the place of actual contact made. Reference letters may be provided by Proposer. Reference letters provided may take the place of actual contact attempts.
 - Client list including those using products recommended to The City by Proposer
 - A list of all government clients who have used Proposer's services and the software proposed.
 - A reference list including clients who have used the vendor's services and the software recommended.
 - Three references from municipalities (cities) of similar size which have used the firm and specific product proposed.
 - Complete references for the prospective vendor's Project Manager for this project

Selection of Finalists

After review of the proposals by the Evaluation Team and formal presentations (if any), the City may, at its sole option, elect to reject all proposals or elect to pursue the project further. In the event that the City decides to pursue the project further, the City will select the proposal(s) that is/are the best offer(s) to negotiate agreement.

Selection of Proposers for formal presentations (if any) and for contract negotiations will be evaluated based on an objective evaluation of the criteria listed above.

Tentative Timeline

The following represents a tentative outline of the process currently anticipated by the City:

- | | |
|--|--|
| ● Request for Proposals issued | March 1, 2019 |
| ● Written Questions Submission Deadline | March 8, 2019, 4:00 p.m., e.s.t. |
| ● Sealed Proposals Due | March 27, 2019, 4:00 p.m., e.s.t. |
| ● Evaluation and Contract Award Period | March-April, 2019 |
| ● Contract Execution (if any) | April-May, 2019 |

Formal Presentations

In the event that a Proposer cannot be selected solely on the Proposals submitted, the City may invite qualified firms for formal presentations. The City reserves the right to invite any number of Proposers, if the quality of the proposals so merits.

The Evaluation Team may revise the initial scores based upon additional information and clarification received in this phase. If your company is invited to give a presentation, the offered dates may not be flexible.

A presentation is for the purpose of clarification only and also may not be required, and therefore, complete information must be submitted with a proposer's proposal.

PAYMENT OF SERVICES

1. The City will make payment according to the City's policies and procedures, after contract execution.
2. Invoices
 - a. Accurate and complete Invoices, with all backup documentation, shall be submitted to:

City of Chattanooga
Attn: Accounts Payable Division
101 East 11th Street, Suite 101
Chattanooga, TN 37402
acctspayable@chattanooga.gov

- b. Contractor's Invoice must list a valid Email Address for billing questions and inquiries.
- c. Contractor's Invoice Date must minimally be the date that the Invoice is submitted to the City. The Invoice Date must not precede submission date, the Ship Date or Service Date.
- d. Invoice descriptions on transaction lines must match the Blanket Purchase Order transaction line items, and must reference the corresponding transaction line number. The Contractor shall not invoice the City for any item that does not correspond to a line on the Purchase Order.
- e. Invoices to the City shall reference the Purchase Order number.
- f. Invoices must be received by the City within two (2) weeks of the completed quoted work, with emphasis on earlier submission.
- g. Any Contractor invoice that is incomplete, inaccurate, or otherwise unable to be processed will not be considered valid or procedurally compliant.
- h. Revised Invoices - must be clearly marked "Revised", and must reference the Invoice Number that it is replacing.

CHECKLIST OF REQUIRED SUBMISSION MATERIALS:

Upon opening, proposals will be examined for the presence of these required materials and *will be rejected if all items are not included*:

1. **Sealed Envelope or Box** - exterior surface **MUST** be labelled with “RFP_182277_ CRM Software Solution for 311 Call Center” and proposer name and address (write on label or package)
2. **Complete Proposal Response Narrative** - Must address Scope of Work portion of this document.
3. **TABBED sections as follows:**
 - a. **TAB 1 Firm’s Cover Letter**
 - b. **TAB 2 Exceptions** to the RFP and/or City of Chattanooga Standard Terms & Conditions *Vendors are required to submit exceptions to the RFP or to the City of Chattanooga Standard Terms and Conditions as specified under Terms and Conditions with the proposal. Do not submit a proposal marked “No Exceptions At This Time” or any similar language not addressing the requirement. Exceptions may not be submitted after proposal submittal.*
 - c. **TAB 3** Proposal for Scope of Work
 - d. **TAB 4** Response to request for **Vendor Information**
 - e. **TAB 5** Pricing/Value/Proposal Cost Summary Form
 - f. **TAB 6 Forms** (all forms as specified below in #4 a-h)
4. **Completed, dated, and signed forms that **MUST** be present with submittal:**
 - a. Completed and signed RFP cover page
 - b. Proposer Qualification Data Form
 - c. W-9
 - d. Experience Reference Form(s)
 - e. Iran Divestment Act Form
 - f. Affirmative Action Plan Form
 - g. No Contact/No Advocacy Affidavit (**MUST be notarized**)
 - h. Any and **all signed Addenda cover pages** from Addenda documents posted to www.chattanooga.gov, Bids Solicitations, related to this solicitation item. **These postings may occur up to 48 hours before the RFP due date/time. If you have shipped your proposal, you may submit any addenda posted up to four (4) days or ninety-six (96) hours before the due date/time to dmkeylon@chattanooga.gov, identifiable by the subject line showing the RFP # and name.**

Proposal Cost Summary Form

The undersigned, being familiar with the requirements of The City of Chattanooga Request for Proposal for a CRM software solution, proposes to furnish products and services to The City in accordance with that request. The summary below reflects projected City costs for the solution acquisition and implementation. Supporting detail must be attached describing hourly rates, projected expenses, software and hardware expenses, annual support and maintenance, discounts along with any other detail that will lead to a clear understanding of the proposed pricing.

Item	Cost
Software Licensing	
Consulting Services	
Technical Support Services	
Training Services	
Annual Maintenance and Support	
Other Costs (Describe)	
Other Costs (Describe)	
Total	

PROPOSER QUALIFICATION DATA

All questions must be answered clearly and comprehensively. If necessary, separate sheets may be attached.

1. Company Name of proposer (Please list official name and any and all "doing business as" names, if any, associated with the company; also specify name on invoices):

2. Main office street address:

P.O. Box address if preferred for general mail:

Payment mailing address:

3. Phone: _____ Fax: _____

a. Email Address: _____

4. Proposers federal tax identification number: _____ (*Please attach Form W-9*)

5. The proposer is organized as a (specify type of entity, e.g. sole proprietor, partnership, for profit corporation, non-profit corporation, limited liability company, etc.)

6. The date the proposer was organized in its current form:

7. If a corporation or limited liability company, the state where it is formed:

8. Is your company registered with the Tennessee Secretary of State?

a. YES

b. NO - Please explain

9. How many years have you be engaged in the business described in this solicitation, under your present firm or trade name:

10. Describe any pending plans to reorganize or merge your organization.

11. Have you, , or any officers and/or directors of your company, ever been debarred or suspended by a government from consideration for the award of contracts?

a. YES - Please list the contract party, and explain

b. NO

12. Have you, or any officers and/or directors of your company, ever been disqualified, removed, sued, or otherwise prevented from proposing on or completing any contract?

a. YES - Please list the contract party, and explain

b. NO

13. Have you, or any officers and/or directors of your company, ever been charged with liquidated damages on a contract?

a. YES - Please list the contract party, and explain

b. NO

14. Bonding

a. Limit: \$ _____

b. Bonding Company: _____

c. Address: _____

d. Phone Number: _____

ONE OF THE FOLLOWING MUST BE MARKED (Must check one):

VENDOR TYPE:	DV - Disabled Vet	_____
	MN - Minority Owned Vender	_____
	MW - Minority Women	_____
	SB - Small Business Vendor	_____
	VE - Veteran	_____
	WB - Woman Owned Business	_____
	NONE OF THE ABOVE	_____

Experience Reference Form

Bidder/Offeror: _____

(Attach as many copies of this form as may be needed)

Reference

Name of Project:

Location: _____

Service Date Range:

Firm Name for Contact Person: _____

Name of Contact Person: _____

Telephone Number for Contact Person: _____

Email Address for Contact Person: _____

Reference

Name of Project:

Location: _____

Service Date Range:

Firm Name for Contact Person: _____

Name of Contact Person: _____

Telephone Number for Contact Person: _____

Email Address for Contact Person:

Affirmative Action Plan

The City of Chattanooga is an equal opportunity employer and during the performance of this Contract, the Contractor agrees to abide by the equal opportunity goals of the City of Chattanooga as follows:

1. The Contractor will not discriminate against any employee or applicant for employment because of race, color, religion, sex, national origin, or handicap. The Contractor will take affirmative action to ensure that applicants are employed, and the employees are treated during employment without regard to their race, color, religion, sex, national origin, or handicap. Such action shall include, but not be limited to, the following: employment, upgrading, demotion, or transfer, recruitment or recruitment advertising, layoff or termination, rates of pay, or other forms of compensation, and selection for training, including apprenticeship. The Contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this nondiscrimination clause.
2. The Contractor will, in all solicitations or advertisements for employees placed by or on behalf of the Contractor, state that all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, national origin, or handicap.
3. The Contractor will send to each labor union or representative of workers with which he/she has a collective bargaining agreement or other contract or understanding, a notice advising the said labor union or workers' representatives of the Contractor's commitments under this section, and shall post copies of the notice in conspicuous places available to employees and applicants for employment.
4. During the term of this contract the following non-discriminatory hiring practices shall be employed to provide employment opportunities for minorities and women:
 - a. All help wanted ads placed in newspapers or other publications shall contain the phrase "Equal Employment Opportunity Employer."
 - b. Seek and maintain contracts with minority groups and human relations organizations as available.

- c. Encourage present employees to refer qualified minority group and female applicants for employment opportunities
 - d. Use only recruitment sources which state in writing that they practice equal opportunity. Advise all recruitment sources that qualified minority group members and women will be sought for consideration for all positions when vacancies occur.
5. Minority statistics are subject to audit by City of Chattanooga staff or other governmental agency.
 6. The Contractor agrees to notify the City of Chattanooga of any claim or investigation by State or Federal agencies as to discrimination.

(Signature of Contractor)

(Title and Name of Company)

(Date)

Chapter No. 817 (HB0261/SB0377). "Iran Divestment Act" enacted.
Vendor Disclosure and Acknowledgement

By submission of this bid, each proposer and each person signing on behalf of any proposer certifies, and in the case of a joint bid each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief that each proposer is not on the list created pursuant to § 12-12-106.

(SIGNED) _____

(PRINTED NAME) _____

(BUSINESS NAME) _____

(DATE) _____

For more information, please contact the State of Tennessee Central Procurement Office,

<https://www.tn.gov/generalservices/procurement/central-procurement-office--cpo-/library-/public-information-library.html>

No Contact/No Advocacy Affidavit
City of Chattanooga, Purchasing Division

State of _____
County of _____

_____ (agent name), being first duly sworn, deposes and says that:

- (1) He/She is the owner, partner, officer, representative, or agent of _____ (business name), the Submitter of the attached sealed solicitation response to Solicitation # **__RFP_181686_** **AUTOMATED TRAFFIC ENFORCEMENT SYSTEM**;
- (2) _____ (agent name) swears or affirms that the Submitter has taken notice, and will abide by the following No Contact and No Advocacy clauses:

NO CONTACT POLICY: After the posting of this solicitation, a potential submitter is prohibited from directly or indirectly contacting any City of Chattanooga representative concerning the subject matter of this solicitation, unless such contact is made with the Purchasing Division.

NO ADVOCATING POLICY: To ensure the integrity of the review and evaluation process, companies and/or individuals submitting sealed solicitation responses, as well as those persons and/or companies formally/informally representing such submitters, may not directly or indirectly lobby or advocate to any City of Chattanooga representative.

Any business entity and/or individual that does not comply with the No Contact and No Advocating policies may be subject to the rejection or disqualification of its solicitation response from consideration.

Submitter Signature: _____ Printed Name: _____

Title: _____

Subscribed and sworn to before me this _____ day of _____, 2_____.

Notary Public: _____

My commission expires: _____