

**CITY OF CHATTANOOGA PURCHASING DEPARTMENT**  
**101 EAST 11<sup>th</sup> STREET, CITY HALL, SUITE G-13**  
**CHATTANOOGA, TENNESSEE 37402**

Request for Proposal No.: **191819**

Ordering Dept.: Department of Public Works

Buyer: Mark McKeel; e-mail: [mmckeel@chattanooga.gov](mailto:mmckeel@chattanooga.gov) (NO E-MAILED PROPOSALS ACCEPTED)

Phone No.: 423-643-7236; Fax No.: 423-643-7244

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Products or Services Being Purchased: **Fleet Management System Solution**

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**SEALED PROPOSALS MUST BE RECEIVED AS SPECIFIED AND NO LATER THAN**

**4:00 P.M. E.S.T. ON MARCH 3, 2020**

**ALL QUESTIONS MUST BE RECEIVED AS SPECIFIED AND NO LATER THAN**

**4:00 P.M. E.S.T. ON JANUARY 28, 2020**

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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/images/City\\_of\\_Chattanooga\\_-\\_Standard\\_Terms\\_and\\_Conditions\\_Revision\\_7.18.2018.pdf](http://www.chattanooga.gov/images/City_of_Chattanooga_-_Standard_Terms_and_Conditions_Revision_7.18.2018.pdf)

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**NOTE: ALL PROPOSALS MUST BE SIGNED.**

**All proposals received are subject to the terms and conditions contained herein and as listed in the above referenced website. The undersigned Offeror acknowledges having received, reviewed, and agrees to be bound to these terms and conditions, unless specific written exceptions are otherwise stated within Offeror's proposal.**

\*\*\*\*\*

**PROVIDE THE FOLLOWING:**

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

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

Phone/Toll-Free No.: \_\_\_\_\_

Fax No.: \_\_\_\_\_

Contact Person for RFP: \_\_\_\_\_

E-Mail Address for all RFP communications: \_\_\_\_\_

Proposal Signature: \_\_\_\_\_

Date of signature: \_\_\_\_\_

**COMPLETED COVER PAGE MUST BE RETURNED WITH PROPOSAL**

City of Chattanooga, Tennessee  
Department of Public Works



Request for Proposals

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Fleet Management System Solution

January 21, 2020

The City of Chattanooga is seeking proposals from qualified suppliers to provide a solution for a fleet management system.

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## **General Information**

### **Introduction**

The City of Chattanooga seeks proposed solutions for a Fleet Management System. This includes all software, hardware, implementation services, continued maintenance and support, and other elements to meet the City's needs.

This solicitation document describes the required and desired features of a 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 within the guidelines. All responses to this proposal should be all inclusive to the specifications to be considered valid.

### **Background Information**

The current software does not allow for easy changes or customization. The reports are not very useful and require additional costs to customize. Data in the system is not organized properly and is costly to repair. The current software company would not agree to City terms for newest SaaS version.

### **Contract Term and Information**

Any resulting blanket contract(s) will be for an initial contract term of one (1) year with four optional one (1) year renewals at the agreement of both parties and using the same Terms and Conditions. The City solely determines the number of contracts awarded, if any. No minimum or maximum quantity is guaranteed to be ordered.

## Functional and Technical Requirements (Scope of Work)

### Functional Requirements

Solution must, at a minimum:

Have an inventory system:

- Parts Inventory Maintenance must include, at a minimum:
  - Reorder Points and Quantity
  - Multiple Vendor Cross References
  - Multiple Bin Locations
  - Core Tracking
  - Warranty Tracking
  - Multiple Part Type Tracking (Part, Tire, Oil, Grease, etc)
  - Stock/Non-Stock Tracking
- Vehicle inventory maintenance must include, at a minimum:
  - Track vehicle usage, tires, MPG, and report maintenance overdue.
  - Purchase Information (date, price, trim, etc)
  - Warranty Information
  - PM Schedules
  - Depreciation
  - Fluid Types and capacities
  - Alternate meters (hours, days, etc)
  - Replacement schedules
  - Vehicle Specs (possibly loaded by VIN)
  - Repair and Parts History
  - Renumbering capability
- Fuel Inventory must include at a minimum:
  - Track and post all fuel transactions by vehicle, employee, pump, quantity, and type
  - Track all variances for pumps and tanks
  - Allow multiple facilities, tanks, and pumps

System must have the following modules:

- Accident/crash module that has capabilities to attach documents such as: estimates, reports and other pertinent documents, and create work orders as needed based on information entered.
- Motorpool Module:
  - Linked directly to Vehicle Inventory
  - Changes update in Motorpool if main vehicle screen is changed
  - Built in monthly Lease Billing with additional charge capability
- Employee Module:
  - Capability to view work performed by mechanic at any given time
  - Combined employee listing usage for multiple facilities
- Work Orders:
  - Ability to bill multiple departments on one work order (normal repairs vs vehicle abuse, accidents, etc)
  - Population of parts catalog by work order VMRS codes
  - All entries tracked by user name, open, close, etc
  - Capability of printing a parts checklist per work order for pulling parts

Track multiple warehouses and parts locations:

- Send automatic reorder notifications
- Offer automation of requisitions based on low qty/usage of parts
- Offer a Purchase Order module to track part purchases
- Track all changes to parts by user
- Quickly update inventory quantities
- Assign parts to work orders
- Track parts usage by vehicle
- Capability to view inventory and transfer inventory to other warehouses.

Have available Vehicle Maintenance Reporting Standards (VMRS) parts codes that meet American Trucking Association, VMRS 2000 or latest version.

Have available VMRS parts catalog that pre-populates from previous buildings.

Standard repair times based on class 1-8 vehicles.

Consolidated parts list with the capability to search parts and see what warehouse has it in inventory.

Hierarchy divisional permission levels for access to information in the system.

Factory recall module with notifications.

Warranty management.

The solution will need a simple barcode system to streamline and optimize inventory levels.

The solution will need to track vehicle usage from fuel entries at pumps, keep up with all standard preventative maintenance scheduling for over 7,000 assets.

The solution will need a simplistic mechanic user work order function.

The solution must be capable of working on either IOS and Windows platforms. The preference to use tablets in the garage.

A way to track bulk fuel distribution from beginning to delivery.

Custom reporting with multiple file types.

Replacement module that has preloaded criteria for replacing fleet.

Leasing/motor pool module to maintain the lease fleet repairs, lease billing.

Work Orders should be able to bill at a standard hourly rate and should be able to mark-up parts and bulk inventory as defined by the user.

The solution must allow for billing to include multiple internal departments as well as external agencies. The billing system must pass journal entries to the City's ERP system for General Ledger (GL) and Accounts Receivable (AR). The solution must be able to fully utilize the City's GL codes and validate them against the City's GL system. GL codes can change over time as re-organizations happen. The solution will preferably have General Ledger.

Billing module:

- Billing multiple types of work to departments off a single work order.

A simple reporting tool giving all analytics for vehicle maintenance, crew performance, fuel usage, and inventory. The ability to export reports, create custom reports with the ability to save the report configuration.

Comprehensive Management of Fleet assets, External work management.

Predictive scheduling and tracking of preventive maintenance, Fuel usage and performance tracking and analysis

Multiple report capability and customization at no additional cost

## **Technical Requirements**

Vendor must incorporate the items in the list of standardizations within Appendix A and/or Appendix B into a contract or exhibit to the City's Standard Terms and Conditions that is to be agreed upon, if the proposed solution involves software and/or cloud/hosting environment. All APIs to work with other software and/or cloud/hosted solutions, i.e. Oracle EBS, Phoenix fueling software.

## **Pricing Considerations**

### **Proposal Pricing Considerations**

The cost proposal must be all-inclusive and must consider all that is required for implementation and for future sustainability of the proposed Fleet Management Solution. The vendor is expected to be knowledgeable of any software and/or services recommended in the proposal.



### **Data Conservation**

Proposals must include all data conservation plans and costs, including data transfer. As a public entity, the City of Chattanooga must maintain records for long periods of time, generally for seven years, and sometimes longer. The City of Chattanooga must maintain ownership of the data so that the City will be provided with all data upon discontinuation of a relationship for any reason.

### **Hourly Rates**

If hourly rates for services, such as programming or training, are charged by the vendor, the hourly rates must be stated.

### **Implementation**

Proposals must include all implementation plans and costs, including data transfer. In case testing is preferred, please include testing options.

### **Training**

Proposals must include all training plans and costs. Training must be provided for each city role required for implementation and for future sustainability of the proposed Fleet Management Solution.

### **Travel Estimates**

Proposals must provide all estimated travel costs associated with implementation, training, and supporting the proposed solution, in addition to other estimated travel costs.

### **Technical Support Services**

Proposals must provide all costs associated with supporting the proposed solution.

### **Year One and Subsequent Years**

Proposals must differentiate between all costs associated with Year One and subsequent years. If the Vendor has regular price increases, the vendor must provide a price for each year of the contract or, if not possible due to policy, the vendor's policy for annual price increases must be stated.

### **Please Use the Pricing Proposal Form in the Appendices with Supporting Documentation as Necessary.**

# Administrative Information For Proposers

## **General Instructions to Proposers**

### **Tentative Timeline for RFP**

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

- |  |  |
|--|--|
| • Request for Proposals distributed            | January 21, 2020                           |
| • <b>Written Questions Submission Deadline</b> | <b>January 28, 2020, 4:00 p.m., e.s.t.</b> |
| • <b>Sealed Proposals Due</b>                  | <b>March 3, 2020, 4:00 p.m., e.s.t.</b>    |
| • Evaluation and Contract Award Period         | March-April, 2020                          |
| • Contract Execution (if any)                  | April-May, 2020                            |

### **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 the RFP due date/time stated on the RFP cover page to the attention of:

Chattanooga Purchasing Dept/**RFP**  
101 East 11<sup>th</sup> 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 or destroyed without exception. Postmarks are not accepted. E-mailed proposals are not accepted for any formal (sealed) solicitation process.**

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)**

The purpose of exterior labelling is allowing handling of the proposal without having to open it.

### **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.

**Whether electronic or paper, all copies must be exactly the same as the original, except for the original ink signature.**

### **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 and Answers By Addendum**

All questions and requests for information or clarification must be submitted in writing, and will be accepted **until the deadline for questions stated on the RFP cover page**, and shall be submitted as follows:

**Preferred method:** email to [mmckeel@chattanooga.gov](mailto:mmckeel@chattanooga.gov) with Subject line reading: **QUESTION for RFP 191819 Fleet Management System Solution\_\_**.

**Alternative method:** mail or fax with clear marking on outside of package or cover sheet **QUESTION for RFP 191819 Fleet Management System Solution\_\_**.

City of Chattanooga Purchasing Division  
Attn: Mark McKeel, Buyer  
101 East 11<sup>th</sup> Street, Suite G13  
Chattanooga, TN 37402

Fax: (423) 643-7244

**All answers will be provided by addendum posted at <http://www.chattanooga.gov/purchasing/bidssolicitations>, 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. Solicitation preparation costs are not compensable. Presentation costs, and any other costs, are also not compensable.

## 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 and Exceptions

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_Revised_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.

Failure to include any desired exceptions in the format required may result in disqualification of a solicitation response.

## 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 Information

## RFP Lifecycle

### 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.** The City, at its sole judgment will determine if a proposal is viable.

For a list of required materials, **see CHECKLIST OF REQUIRED SUBMISSION MATERIALS**

### Evaluation Committee

A committee consisting of individuals selected by the City will receive and evaluate all viable Proposals. Each Proposal will be awarded a maximum of 100 percent based on the evaluation criteria.

### Proposal Evaluation

Viable proposals will be evaluated by an Evaluation Committee. A Proposer may be selected based solely on evaluation of viable written Proposals. The City reserves the right to determine whether or not a Proposer can be selected based solely on the viable written Proposals submitted.

### 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. Such presentations provide an opportunity for clarification of the proposal submitted and an opportunity to ensure that a thorough, mutual understanding exists.

The City reserves the right to invite any number of Proposers if the quality of the Proposal(s) so merit(s) or other circumstances justify doing so.

The Evaluation Committee may revise the initial scores based upon additional information and

clarification received in this phase. If your company is invited to give a formal presentation to the City, the offered dates may not be flexible.

A formal presentation may not be required, and therefore, complete information must be submitted with a proposer's proposal.

## **Selection of Awardee/Awardees**

After review of the Proposals by the Evaluation Committee and after Formal Presentations, if any occur, 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 highest ranked finalist(s) or the proposal(s) that is(are) in the best interest of the City to negotiate agreement.

## **Evaluation Criteria**

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:

- **30 percent: Competence to Perform Scope of Work**
  - Technical quality of goods/services proposed
  - Ability of goods/services to address City's functional needs
  - Demonstration of ability of firm and product to perform
  - May include firm and/or product accreditations, awards, accolades, or similar
  - May include firm's financial strength
  - May include previous or pending lawsuits and/or mediation with other municipalities, etc.
  - And may include other similar factors
- **25 percent: Approach to Scope of Work**
  - Demonstration of understanding of City's needs
  - Plan to address City's needs
  - Detailed plan of implementation
  - Plan for support and maintenance
  - Timeline for implementation by task and day(s), not date specific
  - Key personnel to be assigned to City's project, team and individual and support

- network
- May include other obligations of vendor
- May include commitment to City project
- And may include other similar factors
- **30 percent: Qualifications, firm/team/individual experience, and reference projects**
  - Qualifications of firm, team, and individual(s) assigned
  - Knowledge and experience in general
  - Experience doing similar work, especially for similar government bodies
  - And may include other similar factors
- **15 percent: Price/Value/Cost Efforts**



## PAYMENT OF SERVICES

1. The City will make payment according to the City's policies and procedures.
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](mailto:acctspayable@chattanooga.gov)

With a copy to:  
Matthew McDarmont at  
[mmcdarmont@chattanooga.gov](mailto:mmcdarmont@chattanooga.gov), and  
Takenya Williams at  
[tkwilliams@chattanooga.gov](mailto:tkwilliams@chattanooga.gov)

- b. Vendor's Invoice must list a valid Email Address for billing questions and inquiries.
- c. Vendor'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 Vendor 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 Vendor 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.

## Appendix A: 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.

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### 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 geo-location 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

- 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: Oracle DBMS, Microsoft SQL Server, Oracle MySQL/MariaDB, PostgreSQL, NoSQL (MongoDB/Cassandra).

- Data:

- Data Access:

- 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.
- Provider does not acquire or may not claim any security interest in the data.

- Upgrades:
  - Database as provided must be the current production/LTS version of the DBMS or its -1 version. Vendor should agree to database upgrades as follows:
    - A new DBMS release is deemed “current” when it has been in production release for 180 days;
    - Upon designation of a new “current” version, the previous “current” version becomes Current -1;
    - The previous Current -1 goes into a 270-day countdown period, by then end of which vendor should make available the current version.
- Address validation:
  - An approved geocoding interface must exist for the validation of entered and modified street addresses;
  - Address formats should conform to industry standards and best practices.
- Hosting: *(also refer to Appendix E: Cloud/Hosted Solution Standards)*
- Software must be hosted by vendor or approved alternative. Hosting agreement must include:
  - Technical Support
  - Test instance(s)
    - One (1) or more as deemed necessary;
    - Regular clones from production instance to test instance(s) must be provided;
    - A mechanism by which an additional test instances can be requested, should be provided.
  - Interfaces
    - Vendor should provide accessible interface “hooks” via tools such as APIs and/or web services;
    - Vendor should provide reasonable access for DIT personnel.
- Support:
  - Technical Support
    - Issues relating to network and client devices (desktops, laptops, tablets, etc.) shall be provided by DIT when relevant;
    - The software vendor and/or a third-party vendor must provide other

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

## Appendix B: 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 an 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.

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### 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 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.

## Appendix C: Proposal Cost Summary Form

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

Item	Pricing (One-Time, Annually, Hourly, or other)
Software Licensing/Subscriptions	
Hardware	
Implementation including data transfer	
Consulting Services	
Technical Support Services	
Training Services	
Estimated travel costs	
Annual Maintenance and Support	
Other (describe)	
TOTAL annual cost for each year	

## Appendix D: Proposer Qualification Data Form

### 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):  
\_\_\_\_\_
2. Main office 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 served the population described in this solicitation:

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

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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

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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

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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

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b. ☐ NO

14. Bonding

a. Limit: \$ \_\_\_\_\_

b. Bonding Company: \_\_\_\_\_

c. Address: \_\_\_\_\_  
\_\_\_\_\_

d. Phone Number: \_\_\_\_\_

## Appendix E: Vendor Information Requested

### Vendor Information

Prospective vendors should provide the following information pertaining to their organization and this project within the proposal:

- Size of the organization
- Public financial records from the past two years
- Client list including those using products recommended by the prospective vendor
- Number of years in business providing similar services
- Number of service and support personnel in the organization
- Frequency of software updates (if applicable)
- A reference list including clients who have used the vendor's services
- A list of all government clients who have used the vendor's services
- A plan on what the average upgrade and implementation of Air Pollution Software would take
- A project start date commitment
- A resource availability date commitment
- Complete references for the prospective vendor's Project Manager for this project
- A required roles list for initial implementation and for future sustainability
- A sample project plan
- Detailed information on prospective vendor's "discovery" methodology

Prospective vendors, regardless of previous experience with Fleet Management Solution, must demonstrate a thorough knowledge of the differences associated with municipal government Fleet Management Solution as opposed to those of the private sector with regard to security, open records, data availability and public safety considerations.

Prospective vendors should understand that adherence to all vendor-proposed dates and timelines may become part of said vendor's contractual obligation should their proposal be selected by The City for its Fleet Management Solution.

## Appendix F: Experience Reference Form

### 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 (required): \_\_\_\_\_

#### **Reference**

Name of Project: \_\_\_\_\_

Location: \_\_\_\_\_

Service Date Range:

\_\_\_\_\_

Firm Name for Contact Person: \_\_\_\_\_

Name of Contact Person: \_\_\_\_\_

Telephone Number for Contact Person: \_\_\_\_\_

Email Address (required): \_\_\_\_\_

## Appendix G: Affirmative Action Plan Form

City of Chattanooga, Purchasing Division

July 2016

### **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.

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(Signature of Contractor)

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(Title and Name of Company)

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(Date)

## Appendix H: Iran Divestment Act Form

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>

## Appendix I: No Contact/No Advocacy Statement

### No Contact/No Advocacy Statement City of Chattanooga, Purchasing Division

State of \_\_\_\_\_

County of \_\_\_\_\_

\_\_\_\_\_ (agent name) 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 # \_\_\_\_\_;
- (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: \_\_\_\_\_

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

## Appendix J: Supplier Information Form



### City of Chattanooga Supplier Information Form

Business Name: \_\_\_\_\_

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

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

If your business Tax Filing Status is Individual/Sole Proprietor or a Partnership and you provide a service to the City of Chattanooga, you will be issued a 1099 Form for the preceding Tax year. Please indicate which address you wish your document sent to if applicable:

1099 Address: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Primary Phone Number: \_\_\_\_\_

Primary Fax Number: \_\_\_\_\_

Primary Email: \_\_\_\_\_

Are you Providing: (Check All That Apply)

Service	<input type="checkbox"/>	Construction	<input type="checkbox"/>
Goods	<input type="checkbox"/>		
Both	<input type="checkbox"/>		

Vendor Type (Must be Marked-Check All That Apply)

MBE-Minority Business Enterprise	<input type="checkbox"/>
WBE-Woman Business Enterprise	<input type="checkbox"/>
SDVBE-Service Disabled Vet Business Enterprise	<input type="checkbox"/>
LGBTE-LGBT Business Enterprise	<input type="checkbox"/>
None of the Above	<input type="checkbox"/>

Preferred Payment Method

Check	<input type="checkbox"/>
ACH	<input type="checkbox"/>

ACH-Please provide remittance notice email and complete Separate City ACH Authorization Form:

\_\_\_\_\_

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

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Date

## CHECKLIST OF REQUIRED SUBMISSION MATERIALS:

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

1. **Sealed Envelope or Box** - exterior surface **MUST** be labelled with the RFP number and name and the proposer name, address, and phone #
2. **Complete Proposal Response Narrative** - must address Scope of Work and Proposal Response portions of this document.
3. **TABBED sections as follows:**
  - a. **TAB 1** Firm's Cover Letter
  - b. **TAB 2** Any and all exceptions to the RFP and/or City of Chattanooga Standard Terms & Conditions; **MUST** be submitted with response to be considered
  - c. **TAB 3** PROPOSAL RESPONSE
  - d. **TAB 4** Pricing/Proposal Cost Summary with Form (Appendix C) or same information
  - e. **TAB 5** Vendor Information (all items listed in Appendix E)
  - f. **TAB 6 ALL Forms below:**
4. **Completed, dated, and signed forms that **MUST** be present with submittal:**
  - a. Completed and signed RFP cover page (in addition to firm's cover letter)
  - b. Proposer Qualification Data Form (Appendix D)
  - c. W-9
  - d. Experience Reference Form(s) (Appendix F) - with valid contact information
  - e. Supplier Information Form, for all suppliers which have not previously done business with the City of Chattanooga (Appendix J)
  - f. Iran Divestment Act Form (Appendix H)
  - g. Affirmative Action Plan Form (Appendix G)
  - h. No Contact/No Advocacy Statement (Appendix I)
  - i. Any and all signed Addenda cover pages from Addenda documents posted to [www.chattanooga.gov](http://www.chattanooga.gov), then Bids Solicitations, related to this solicitation item. These postings may occur up to 48 hours before the RFP due date/time. For addenda posted in the last ninety-six (96) hours before the due date/time, properly identified, signed addenda cover pages to

accompany proposals that have already been shipped will be accepted by e-mail to [mmckeel@chattanooga.gov](mailto:mmckeel@chattanooga.gov).