

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

Request for Proposal No.: 206388

Ordering Dept.: Economic and Community Development/Outdoor Chattanooga/Open Spaces

Buyer: Deidre Keylon; e-mail: dmkeylon@chattanooga.gov (NO E-MAILED PROPOSALS ACCEPTED)

Phone No.: 423-643-7231; Fax No.: 423-643-7244

Products or Services Being Purchased: Online Reservation System Software and Services

SEALED PROPOSALS MUST BE RECEIVED AS SPECIFIED AND NO LATER THAN

4:00 P.M. E.S.T. ON JANUARY 26, 2021

ALL QUESTIONS MUST BE RECEIVED AS SPECIFIED AND NO LATER THAN

4:00 P.M. E.S.T. ON JANUARY 12, 2021

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/newpurchasing/doing-business-with-the-city/how-we-do-business>, see link entitled "Standard Terms and Conditions."

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
Division of Open Spaces



Request for Proposals

Online Reservation System Software And Services

January 4, 2021

The City of Chattanooga is seeking proposals from qualified suppliers to provide a cloud-based activity and participant reservation system and related services.

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General Information

Introduction

The City of Chattanooga seeks proposed solutions for an Online Reservation Software System and Services. 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 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.

The City currently operates several publicly accessible facilities and offers a variety of recreational programming that requires registration and/or payment. Additionally, the City manages several permitting processes for hosting events. The City is seeking an internet-based (cloud), fully integrated, self-service system for facility reservation, application processing, workflow integration, recreational programming registrations & scheduling, real-time calendar, point-of-sale, and customer database management solution to these processes.

The City is seeking a proven software solution for centralized reservations, as opposed to highly customized software, such that the system will demonstrate a high degree of established compatibility between the components, share customer and financial data across the entire system and any modules (including any subcontracted systems, if applicable), and provide reservations and registration data access for park users, supervisors, and City administration.

Background Information

The project includes definition, procurement, implementation, and deployment of a comprehensive cloud-based software system that interacts with the City's financial system (currently Oracle E-business Suite; in the future...Oracle Cloud).

The functionality must include: participant registration, facility reservation, scheduling, volunteer, and fundraising tools. Additional functionality must include seamless integration with OutdoorChattanooga.com and Chattanooga.gov websites, intuitive user design, and the ability to incorporate forms and authorizations/agreements.

The solution must allow for taking payments online, preferably through the use of the City's credit card processor, currently FIS. If your company has an existing arrangement with a credit card processor, please indicate the cost to the City to use your processor versus having your company use the City's processor.

Chattanooga is also interested in development, implementation, support, and training that will maximize the effectiveness of the cloud-based solution.

The City of Chattanooga's intended user groups are split between Parks Maintenance, Outdoor Chattanooga, and Open Spaces. Currently, Outdoor Chattanooga offers activities and programming under its own brand. Participants are required to register, sign waivers, and provide payment (programs free or fee-based) prior to receiving confirmation and receipt of payment. Parks Maintenance currently offers park and facility reservations that require deposits, waivers, and payments. Open Spaces manages the Special Events Process. The ideal solution would offer separate receipt and program branding solutions, and integrate park reservations with the Online Special Events Permitting Process.

The City of Chattanooga has over 85 parks with various rental options and facilities per park. A large majority of parks have a standard rental rate; however, some of our Signature Parks have split rates and rental options. These are venues that typically host Citywide Events and Programs. Additionally, our Outdoor Chattanooga staff regularly creates and implements new programs, so the ideal solution would allow our staff to create new program offerings for participants to register for. Our Special Events Process manages a few hundred races, concerts, marathons, and other community-wide programs annually. We are currently developing an in-house online process for managing Special Event Requests. The ideal solution would integrate our park reservations and/or replace our online system with a more comprehensive and robust online process.

This request solicits proposals to furnish the municipal government of Chattanooga, hereinafter referred to as "The City", with an online Self-Service Registration and Reservation solution, hereinafter referred to as "SSR&R". Specifications describing the functional and technical requirements of the SSR&R can be found in this document. It is The City's intent to select the most suitable solution based on responses to the RFP.

This request solicits proposals covering eight areas as listed below. The proposals should provide recommendations and service level agreement details (hereinafter referred to as "SLA") for each area:

- (1) Deployment Time and Upgrades
- (2) Redundancy
- (3) Flexibility and Customized Services
- (4) Security
- (5) Scalability

(6) Cost Benefits

(7) Total Cost

(8) Support/Help Desk Availability

Contract Term and Information

Any resulting blanket contract(s) will be for an initial contract term of one (1) year with up to 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

The online registration software is to provide an online internal and external means of registration and management for: facility reservation, overnight camping reservation, programs/events registration, summer camps registration, youth programs registration, and special permit reservations.

The solution will need to allow for road closures via the City process of Special Event Road Closure Permits w/CDOT. The process includes the application filing, CDOT review, payment, and then confirmation.

The solution should provide a point of sale option for locations and remote events.

The solution will need to provide custom form inputs for participants to identify medical conditions, ACA needs, demographic details, and weight/height during the booking process.

The solution will need to provide custom form inputs for items such as number in party, electricity needs, etc.

The solution will need to provide custom form inputs for items such as waivers, releases, and disclaimers.

The solution will also need to provide a place for registrants to sign the waivers and disclaimers.

QUESTIONS FOR OFFERORS (Answers are required in the response)

Please provide answers to the following requirements and data interoperability questions:

- A. Which data formats can data be exported to or imported from?
- B. How does the system force completion of required paperwork, permissions, releases, or waivers prior to final check-out?
- C. How does the system link customers by household and identify guardians for minors?
- D. How does the system link rentals and reservations to the paying customer when different than the person making the reservation?
- E. Are there limitations to merchant services providers use with the system? If so, explain.
- F. Chattanooga prefers not to have credit card information stored; how does the system process credit card purchases? The goal is to not charge the credit card until the program has been completed, thus reducing the refund process.
- G. How does the system handle deposits and refunds?
- H. Which credit card issuers are supported for purchases in the system?
- I. Will Chattanooga retain full access and ownership of data?
- J. Does the system have the ability to display blocked/available dates for programs and facilities for end users to see?
- K. Is an open API available to Chattanooga? A requirement of this software is an open API for integration in various 3rd party tools. Please describe the platform's API at a high level.

Workflow, reporting, and front-end functionality:

- A. Is a staff scheduling tool provided? Which calendar systems does the scheduling tool integrate with?
- B. What is the system's ability to generate specific facility and staff schedules that sync with registrations?
- C. How does the system allow for online donations, up-selling or bundling of programs, and memberships before check-out?

- D. What registration discount and promotional code functionality does the system offer?
- E. Describe the process necessary to block availability for a series of dates or series of programs and facilities. Is this process automated?
- F. Does the system have limitations or the ability to set limitations on available reservation dates? If so, describe.
- G. Does the system have an accommodation to assign each facility, program, and/or event a unique identifying index so it may be used for integration with the City's web sites?
- H. Can reservations be queried by various selection criteria for update, editing, reporting, and/or modification? Please describe the process and available selection criteria.
- I. Can an alternate contact field be accommodated for reservations?
- J. Can duplicate accounts be merged into a single account? Can the history of both accounts be combined on the retained account?
- K. Does the system have a means to send surveys and reminders to registrants? Please describe.
- L. Does the system provide or integrate with point of sale systems, scheduling, volunteer, and fundraising tools?
- M. Does the system contain social media features including mobile website capabilities?
- N. Is there a field for administrative note that are not viewed by the registrant to be included with a reservation?
- O. Can scanned documents be attached to reservations?
- P. How are cancellations processed?
- Q. Does the solution allow for customized pricing depending on input from the participant/customer?

Reporting:

- A. How many standardized or “canned” reports are included with the system? Please provide examples/lists.
- B. Describe report writing capabilities that provide demographic, location, usage, and financial analysis via date periods and various queries.
- C. What process and/or reports for monthly and annual reconciliation to financial software and general ledger are included with the system?

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, Oracle Cloud software.

Within the response, describe the proposed systems accommodation of the following items:

1. Software and hosted standards (see appendices)
2. Provide secure user accounts
3. Accessibility for users with special needs
4. Responsive design, all platforms should be usable on mobile, tablet, and desktop devices

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. Fixed dates/times are in bold type.

- Request for Proposals distributed January 4, 2021
- **Written Questions Submission Deadline** **January 15, 2021, 4:00 p.m., e.s.t.**
- **Sealed Proposals Due** **January 26, 2021, 4:00 p.m., e.s.t.**
- Evaluation and Contract Award Period February-March, 2021
- Contract Execution (if any) March-April, 2021

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 206388 Keylon**
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 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 two (2) complete copies of the proposal as follows: one (1) original - unbound; 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 dmkeylon@chattanooga.gov with Subject line reading: **QUESTION for RFP 206388 Online Reservation System Software and Services__**.

Alternative method: mail or fax with clear marking on outside of package or cover sheet **QUESTION for RFP 206388 Online Reservation System Software and Services__**.

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 <http://www.chattanooga.gov/newpurchasing/procurement-opportunities/currently-open-bids>, 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/newpurchasing/doing-business-with-the-city/how-we-do-business>, see link entitled "Standard Terms and Conditions."

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 may 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

- **30 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 - availability
 - 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
- **10 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

With a copy to:

tkazmierzak@chattanooga.gov

jcutcliff@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.

PROPOSAL ORGANIZATION GUIDELINES

This RFP document is intended to describe The City's minimum requirements and response format in sufficient detail to secure comparable proposals. To assist the Evaluation Committee in its effort, it is asked that Offerors adhere to the requests for tabbed sections.

TAB 1 – COVER LETTER, EXCEPTIONS, AND COMPANY INFORMATION

- Firm's Cover Letter signed by authorization person
- RFP Cover Sheet (page 1) completed and signed by authorization person
- Company Information
 - Description of organization
 - e.g., Philosophy of organization
 - e.g., Size of organization
 - e.g., Number of years in business providing similar services
- Proposer Qualification Data (see Appendix) including public financial records from the past two years, if applicable.
- Exceptions

From the vendor information request list:

- Size of the organization

- Number of years in business providing similar services

TAB 2 – SOLUTION NARRATIVE

The response to requirements and/or preferences. Answers to questions should be included here.

TAB 3 – PROJECT APPROACH

Offeror should include at a minimum:

- Description of roles and responsibilities, including deliverables
- Proposed project plan
- Proposed schedule/timeline (not date specific)
- Availability for City of Chattanooga work
- Assigned staff (see also Key Personnel below)
- **From the vendor information request list:**
 - Number of service and support personnel in the organization
 - Frequency of software updates (if applicable)
 - A plan on what the average timeline for implementation would take
 - A project start date commitment (the City is hoping for a start date on or fairly soon after March 1, 2021)
 - A required roles list for initial implementation and for future sustainability
 - A sample project plan
 - Detailed information on prospective vendor’s “discovery” methodology

TAB 4 – KEY PERSONNEL

Offeror should include at a minimum:

Assigned Team and/or Individual(s)

- Resume(s) of assigned personnel

TAB 5 – REFERENCES

- Offeror must provide a list of governments that have experience using the services recommended
- Offeror must provide three references to be contacted. The City may or may not contact the references, and the City may contact others, in addition. Offeror must use Experience Reference Form(s) or the equivalent and must provide current contact information, including the e-mail address of the reference.
- From the vendor information request list:
 - Client list including those using products recommended by the prospective vendor
 - 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
 - Complete references for the prospective vendor's *Project Manager* for this project

TAB 6 – PRICE PROPOSAL

Refer to Appendix for Proposal Cost Summary Form or use substitute detailing pricing. If your company has a pre-existing relationship with a merchant card services provider, please price using your preference and separately price if using the City's current merchant card services provider, FIS (or any other provider contracted with the City at a later date).

TAB 7 – ADDITIONAL REQUIRED FORMS

- Affirmative Action Plan Form (Appendix)
- Iran Divestment Act Form (Appendix)
- No Contact/No Advocacy Statement (Appendix)
- Supplier Information Form (Appendix)
- Signed Addenda cover pages:

To acknowledge receipt of information provided by Addendum, Offeror is required to submit with the Proposal a signed Addendum cover page for each Addendum posted

- Any and all signed Addenda cover pages from Addenda documents posted to the internet address below related to this solicitation item. These postings may occur up to 48 hours before 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 email to dmkeylon@chattanooga.gov.

- o Internet Address:

<http://www.chattanooga.gov/newpurchasing/procurement-opportunities/currently-open-bids>

TAB 8 – Public Financial records (from the vendor information request list: Public financial records from the past two years)

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.

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.

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:

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: _____

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.

(Signature of Contractor)

(Title and Name of Company)

(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 detailed above**
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, 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 dmkeylon@chattanooga.gov.**