



Request for Proposal (RFP)
Service Request Management (SRM)/Work Order/Customer
Relationship Management (CRM) Software for Public Works

The City of Morgan Hill is requesting proposals from qualified respondents to provide Service Request Management (SRM)/Work Order/ Customer Relationship Management (CRM)/ Software.

**Phase I Proposals are due on January 31, 2020 at 5:00 p.m. (Pacific Time)
at City Hall located at
17575 Peak Avenue, Morgan Hill CA 95037**

CONTENTS

1 BACKGROUND..... 3

2 INTRODUCTION..... 3

3 MINIMUM QUALIFICATIONS 4

4 COMPLETE RFP 5

5 PROCUREMENT TIMELINE..... 5

6 CONTACT INFORMATION / DELIVERY LOCATION 6

7 HOW TO OBTAIN THIS RFP..... 6

8 PROCEDURE FOR SUBMITTING QUESTIONS and INQUIRIES..... 6

9 OBJECTIONS 6

10 LATE PROPOSALS 6

11 PROPOSAL SUBMISSION OVERVIEW 7

12 PROPOSAL SUBMISSION REQUIREMENTS/RESPONSE DOCUMENTS 7

13 REVIEW PROCESS and EVALUATION CRITERIA..... 10

14 BASIS OF AWARD 133

15 PROTESTS 13

16 GENERAL INFORMATION..... 14

17 ADDENDA AND INTERPRETATION..... 15

18 CITY ASSETS 15

19 EXAMINATION OF PROPOSED MATERIAL..... 15

20 CODE ADHERENCE, PERMITS and FEES..... 15

21 TERMS AND CONDITIONS OF AGREEMENT 16

22 REJECTION OF BIDS AND AWARD OF CONTRACT 16

23 EXECUTION OF CONTRACT 16

24 INSURANCE REQUIREMENTS 16

25 INDEMNIFICATION 17

26 PUBLIC NATURE OF PROPOSAL MATERIAL..... 177

27 NON-DISCRIMINATION/NON-PREFERENTIAL TREATMENT..... 177

28 CITY BUSINESS LICENSE..... 18

ATTACHMENT 1 – STATEMENT OF REQUIREMENTS..... 19

ATTACHMENT 2 – EXISTING SYSTEMS OVERVIEW 42

ATTACHMENT 3 – COMPANY BACKGROUND..... 43

ATTACHMENT 4 – CUSTOMER REFERENCES 44

ATTACHMENT 5 – WAGE THEFT PREVENTION PROPOSAL CERTIFICATION..... 47

ATTACHMENT 6 – INSURANCE REQUIREMENTS 48

ATTACHMENT 7 – DEFENSE AND INDEMNIFICATION..... 51

1 BACKGROUND

1.1 CITY OVERVIEW

The City of Morgan Hill (City) is located within the southern part of Santa Clara County, California, 10 miles south of San Jose and 10 miles north of Gilroy. Morgan Hill is situated between the Diablo Mountain Range and the Santa Cruz Mountains, and has a rich history of farming and manufacturing. While Morgan Hill resembles Silicon Valley in its business mix, rich entrepreneurial spirit and quest for innovation, the city's natural geography and open space make it a unique place. The City is 13 square miles, home to approximately 44,000 residents and 1,200 businesses employing approximately 16,000 people. Over 47% of households in Morgan Hill earn over \$100,000 a year. Over 70% of all employed residents travel more than 20 miles to work each day. Morgan Hill is best known for its superb quality of life with access to open space and abundant recreational amenities that give businesses, visitors, and residents alike a unique place within Silicon Valley to live, work, and recreate.

1.2 KEY PUBLIC WORKS FUNCTION OVERVIEW

1.2.1 Community Services Maintenance Division: The Maintenance Division maintains City streets, sidewalks, trails, 3,700 streetlights, 470 open space/park acres, urban forestry, all City buildings, and a landscaping assessment district. Common Service Requests for this division include repair and maintenance for buildings, trees, roads, parks, and streetlights.

1.2.1 Utilities: The Utilities Division is responsible for the operation and the ongoing planning, maintenance, and operations of the City's Water and Wastewater systems. The Utilities Division operates and maintains both systems with an experienced team of City staff members and specialized contract services. Ongoing operations are funded via enterprise funds through ratepayers paying to utilize the systems. Examples of Service Requests for this division include water main repairs, fixing sewer overflows, and handling street leaks.

2 INTRODUCTION

2.1 The City of Morgan Hill (hereinafter "City") is soliciting proposals for a Service Request Management (SRM)/Work Order/Customer Relationship Management (CRM) Software solution in support of Public Works. The SRM/Work Order/CRM shall be a web-based, Commercial-Off-The-Shelf (COTS) solution including professional services, installation, implementation, and training. While the City prefers a hosted cloud-based platform, it is open to an on-premise solution. Most of the functionality should already exist within the COTS, without the necessity of writing new software or new code to meet the City's requirements.

2.2 The objective of this RFP is to evaluate and select a solution that best meets the technical, functional and business requirements of the City. It is the City's intent to select a Proposer that has experience implementing SRM/Work Order/CRM software solutions comparable in size, scope and complexity to the City's requirements, including internal and external customers. Experience with governmental agencies, including California implementations, is a plus.

2.3 Please refer to Attachment 1 – Statement of Requirements for a detailed statement of required services.

3 MINIMUM QUALIFICATIONS

A Proposer will be considered “non-responsive” to this RFP and will be disqualified from further consideration if any of the following minimum qualifications are not met.

3.1 Self-certifications of experience and technical solution to be provided in Cover Letter:

3.1.1 Proposer(s) must have at least 3 years of experience implementing SRM/Work Order/CRM software solutions. The years of experience must be demonstrated by detailing company's experience, years providing SRM/Work Order/CRM software solutions and qualifications.

3.1.2 The proposed solution meets the Minimum Technical Requirements as outlined in Attachment 1 Statement of Requirements.

4 COMPLETE RFP

This document describes the goals and objectives of this procurement, the RFP process, and RFP provisions. In addition, the following attachments, exhibits and/or appendices are included:

4.1 ATTACHMENTS

Attachment Number	Title
1	Statement of Requirements
2	Company Background
3	Previous Customer Reference Form
4	Wage Theft Prevention Proposal Certification
5	Insurance Requirements
6	Defense and Indemnification

5 PROCUREMENT TIMELINE

Date	Time	Event
December 11, 2019	1:30 pm	RFP Released
January 10, 2020	5:00pm (Pacific Time)	Deadline for submittal of Proposer objections and questions
January 31, 2020	5:00pm (Pacific Time)	RFP Phase 1: Proposals Due
February 24 – March 6, 2020*	TBD	RFP Phase 2: Interview/Demonstrations and Reference Checks (for semifinalists only)
March 16, 2020	TBD	RFP Phase 3 – Final Total Cost & Statement of Work Due (for finalists only)

* Dates subject to change

6 CONTACT INFORMATION / DELIVERY LOCATION

City of Morgan Hill
Community Services
17575 Peak Avenue
Morgan Hill, California, CA 95037
Attn: Chris Ghione
E-mail: Chris.Ghione@morganhill.ca.gov

7 HOW TO OBTAIN THIS RFP

7.1 This RFP may be downloaded from the Public Purchase system located at <https://www.publicpurchase.com>. Registration is free. Proposers can also find a link on the City of Morgan Hill website at <http://www.morganhill.ca.gov/bids.aspx>.

7.2 All addenda and notices related to this procurement will be posted by the City on Public Purchase and on the City's website, on the Bid Postings page, as noted in Section 7.1. If this RFP is obtained through any means other than these, the City will not be responsible for the completeness, accuracy, or timeliness of the final RFP document.

8 PROCEDURE FOR SUBMITTING QUESTIONS and INQUIRIES

Questions pertaining to this RFP should be submitted via email to Chris.Ghione@morganhill.ca.gov. Please submit all questions by the deadline indicated in the procurement timeline, Section 5. The City will provide a written response to all pertinent questions received by the deadline in the form of an Addendum. Answered questions shall be considered addenda to the RFP.

9 OBJECTIONS

Any objections as to the structure, content or distribution of this RFP must be submitted in writing to the contact identified in Section 6 prior to the submission deadline for Questions and Answers. Objections must be as specific as possible, and identify the RFP section number and title, as well as a description and rationale for the objection.

10 LATE PROPOSALS

Late proposals shall be rejected and returned to the proposer. The deadline in Section 5 Procurement Timeline is absolute, and proposals received after the due date and time shall not be considered. Proposers must select a method of delivery that ensures proposals will be delivered to the correct location by the due date and time.

11 PROPOSAL SUBMISSION OVERVIEW

- 11.1** This RFP does not commit the City to pay any costs incurred in the submission of a proposal or in making any necessary studies or designs for the preparation thereof, nor the purchase or contract for the services.
- 11.2** After acceptance of the successful proposal by the City, the successful Proposer(s) shall be obligated to enter into an agreement consistent with the proposal submitted.
- 11.3** Should the successful Proposer fail to execute the agreement, the City shall have the right to seek legal remedies against the Proposer, including but not limited to an action for damages and shall have the right to award to the next responsive Proposer.

12 PROPOSAL SUBMISSION REQUIREMENTS/RESPONSE DOCUMENTS

In order to expedite the evaluation process, each Proposal shall be organized in accordance with this section. Proposals that do not follow the specified format outlined below, or fail to provide the required documentation, may receive lower scores, or if found to be non-responsive, be disqualified. In the event of any conflict between any of the Proposal documents, resolution thereof shall be in the City's sole discretion.

12.1 FORMAT

- 12.1.1** Submit one (1) original and three (3) copies of the solution proposal clearly marked as such. The outside of the box or package and the cover or title page of each proposal shall be marked as follows: **CSD2020-040: SRM/Work Order/CRM Software Proposal**. In addition, include an electronic copy of your proposal on a CD, DVD, or flash drive, in MS-Word and pdf format.
- 12.1.2** Refer to the procurement timeline in Section 5 for due dates and Section 6 for delivery locations.
- 12.1.3** All Proposals shall be submitted as hard copy bound documents, as described above. The Original hard copy version of the proposal will be considered the official proposal submission.
- 12.1.4** All pages shall be sequentially numbered, and a table of contents shall be provided.
- 12.1.6** The font size on each page shall be 11-point Times New Roman or Arial font.

12.2 CONTENT Proposal responses shall include the following content, in accordance with the format described in preceding Section 12.1 Format:

12.2.1 Cover Letter

Include a transmittal letter identifying the Proposer's firm and include the number of years of experience providing SRM/Work Order/CRM Software solutions as required under Minimum Qualifications Section 3.1. Also include other important general information that is deemed significant enough to be highlighted. The letter shall provide the name, title, address, telephone number, email address, and fax number of the individual authorized to contractually bind the firm and be signed by that authorized individual.

12.2.2 Executive Summary

Include the type of technology proposed (cloud, hosted or on-premise), a summary containing highlights of the proposal, describing how the Proposer will meet the requirements of the RFP, including the Proposer's approach to providing the services described in this RFP, describing how the project team would be organized, a statement of the Proposer's understanding of the project and services required, and how the Proposer will ensure responsiveness to City staff and project requirements.

12.2.3 Organization Chart & Staff Qualifications

The proposal shall detail the organization structure of the team including names and positions of the Project Manager and key personnel to be assigned to the project, as well as provide general resumes and relevant experience of the Project Manager and key staff. These should clearly demonstrate Proposer's qualifications and Project Manager's qualifications to perform the project activities described in this RFP.

12.2.4 Customer References

Submit three different customer references using the forms in Attachment 3 Customer References, where the same or similar SRM/Work Order/CRM software solution that you are proposing has been installed and implemented. The company submitting the proposal must have performed the work as the prime contractor at each of the referenced customers provided; the agreement must have been made between the reference customer and the company submitting the proposal (not as a subcontractor).

At least ONE of the three references should be from a municipality or public agency. California public sector agencies are preferred.

References shall be evaluated and scored as described in Section 13 Review Process and Evaluation Criteria. Therefore, it is important that each reference be complete and descriptive of the work that was done, and as close as possible to the City's project requirements as described in the RFP.

12.2.5 Response to Technical/Functional Requirements

12.2.5.1 The Proposal shall also include a direct and detailed response to each item in the spreadsheet outlined in Attachment 1, Statement of Requirements.

12.2.5.2 Where appropriate, provide supporting documentation such as screen shots, sample reports and user documents in order to demonstrate how the specification is addressed.

12.2.5.3 Respond to each specific question. Proposers may attach additional sheets, referencing Requirement Item Number, as needed.

12.2.6 Project Schedule

The Proposal shall provide a Project Schedule that the Proposer believes is most appropriate and realistic to complete the scope of work for this project. This schedule section shall contain a general Microsoft O365 Project Gantt chart (or similar project planning tool) for each of the tasks identified in the Project Schedule and/or as pertaining to the major deliverables set forth by this RFP. The schedule for each task and timing of each deliverable should be based upon the number of calendar days or weeks needed to complete the project.

The City will make sure that City staff is available as required by the approved schedule to ensure timelines are met.

12.2.7 Deliverables

Deliverables are defined as material tasks or phase products. For example, meeting reports, such as fit/gap; preliminary data, such as configuration tables; or interface documentation. Proposer shall include a list of all proposed deliverables to be used as the basis for contract payments. Deliverables shall be divided into two or more phases covering the entire timeline of the project.

12.2.8 Sample Documents

The proposal response shall include the following sample documents:

- 12.2.8.1 Examples of design documents developed for a project of similar scope for other clients of comparable size to the City.
- 12.2.8.2 License Agreement, including warranty for solution being proposed, if any.
- 12.2.8.3 Support and Maintenance Agreement for solution being proposed, if any.
- 12.2.8.4 System Security and Disaster Recovery Plan for solution being proposed.

12.3 Cost Proposal

A cost proposal will not be requested initially. During the phased evaluation process, only those Proposers that advance to the finalist stage (Phase 3) will be requested to submit cost proposals under directions given at a later date. Proposers shall be prepared to provide cost proposals within a reasonable time after being requested to do so by the City.

13 REVIEW PROCESS and EVALUATION CRITERIA

The proposals received will be reviewed for Proposal Responsiveness. This is a PASS/FAIL review. Proposals will be reviewed to ensure that they meet minimum qualification requirements as described in RFP Section 3 Minimum Requirements and that all required documentation is included with the proposal submission as described in Section 12 Proposal Submission Requirements/Response Documents. Only responsive proposals will be considered. Proposals that are deemed non-responsive will be disqualified from further consideration.

The RFP submittals shall be evaluated in a three-phased approach, as described below.

13.1 PHASE 1 -Company Background, Customer References, Technical/Functional Requirements, and Documentation

The Proposer's experience and qualifications will be evaluated based on the written submittals as per Section 12 Proposal Submission Requirements/Response Documents. There are 500 available points for Phase 1:

Phase 1 Evaluation Area	Points
Cover Letter	50

Company Profile	100
Customer References	50
Technical/Functional Requirements	150
Project Schedule and Deliverables	75
Sample Documents	75
Total	500

The highest scoring Proposers from Phase 1 will advance to Phase 2.

13.2 PHASE 2 – Interview/Demonstration and Reference Checks

Phase 2 will focus on interviews/demonstrations and reference checks. The total points available for Phase 2 is 350.

13.21 – Interview/Demonstration

At the on-site interview/demonstration, Proposers will be asked to make an oral presentation and provide a demonstration of their proposed solution.

The demonstration will provide Proposers with an opportunity to explain the technical design, features, and capabilities of their solution and their proposed implementation approach. Proposers shall also be prepared to answer detailed questions regarding their response to the RFP. All demonstrations must be presented by Proposer staff that is familiar with the proposed solution.

The evaluation of the demonstrations will be based on:

- Ability to provide solution
- Accuracy/completeness in relation to RFP response
- Clarity of presentation
- Adherence to presentation schedule

13.22 – Reference Checks

At least three clients from the Proposer’s reference list (as referred to in Section 12.2.4) will be contacted for a reference check. Each client will be asked a list of predetermined questions. The reference client’s response to these questions will be scored using a 5-point rating scale. An average reference score will be calculated for each Proposer.

Phase 2 Evaluation Area	Points
Interview/Demonstration	250
Reference Checks	100
Total	350

The highest scoring proposals from this Phase 2 will advance to Phase 3.

13.3 PHASE 3 – Final Total Cost & Statement of Work

In this last phase, a cost proposal will be requested from the finalist(s). A Best and Final Offer (BAFO) may also be requested. In addition, Proposers will be required to submit a Statement of Work.

Each finalist’s Final Total Cost Proposal, including the associated Statement of Work and Project Schedule will be due 14 calendar days from the date of their Interview/Demonstration. The scoring for cost will be determined through an analysis which considers total submitted costs; baseline functionality vs. modifications; total implementation costs; and annual service costs for a five (5) year period. The Proposer’s Statement of Work, including the implementation project plan, phase detail, deliverables, proposed staff, post-implementation support and project schedule will also be considered.

Phase 3 Evaluation Area	Points
Total Cost	75
Project Schedule/Statement of Work	75
Total	150

13.4 Proposal Review & Evaluation

13.4.1 The proposals will be evaluated against the Phase criteria and scores will be applied as described in Sections 13.1, 13.2, and 13.3.

13.4.2 During any Phase or at any point in the process, the City may seek clarification from any or all Proposers in order to better understand and evaluate the proposed solution. This process may not be used as an opportunity to submit missing documentation or to make substantive revisions to the original proposal.

13.5 Best and Final Offer (BAFO)

13.5.1 A Best and Final Offer (BAFO) may be held with one or more Phase 3 participants if final information or clarification is necessary in order to make a final decision. The BAFO may allow Proposers to revise their original technical and/or cost proposals based on information received from the City. The City will send out the request for a BAFO with instructions addressing the areas to be covered and the date and time in which the BAFO is to be submitted. After receipt of the BAFO, scores may be adjusted based on the new information received in the BAFO.

13.5.2 The City will request only one BAFO, unless the City’s Purchasing Officer determines in writing that another BAFO is warranted.

13.5.3 Proposers are cautioned that the BAFO is optional and at the sole discretion of the City. Therefore, Proposers should not assume that there would be an additional opportunity to amend their technical or price proposals after the original submission of technical and price proposals. Proposers may not request an opportunity to submit a BAFO.

14 BASIS OF AWARD

Award of RFP will be based on the overall highest ranked proposer score in accordance with Section 13. Should the City, in its sole discretion, determine that a secondary award is required, award will be to the second highest ranked proposer. Should any of the selected proposers fail to provide post award documents as required, the City, in its sole discretion, may withdraw the award recommendation, and select the next highest ranked proposer for award.

The City reserves the right to accept an offer in- full, or in-part, or to reject all offers.

15 PROTESTS

Any bid protest must be in writing and received by the City Attorney's Office at 17575 Peak Avenue, Morgan Hill, CA, (Fax: (408) 779-1592), before 5:00 p.m. no later than ten (10) working days following the Notice of Award/Notice of Intent to Award [after bidders are notified of bid results via an e-mail] (the "Bid Protest Deadline") and must comply with the following requirements:

Only a bidder who has submitted a responsive Proposal is eligible to submit a bid protest against another bidder. Subcontractors are not eligible to submit bid protests. A bidder may not rely on the bid protest submitted by another bidder but must timely pursue its own protest.

The bid protest must contain a complete statement of the basis for the protest and all supporting documentation. Material submitted after the Bid Protest Deadline will not be considered. The protest must refer to the specific portion or portions of the Contract Documents upon which the protest is based. The protest must include the name, address and telephone number of the person representing the protesting bidder if different from the protesting bidder.

A copy of the protest and all supporting documents must also be transmitted by fax or by e-mail, by or before the Bid Protest Deadline, to the protested bidder and any other bidder who has a reasonable prospect of receiving an award depending upon the outcome of the protest

The protested bidder may submit a written response to the protest, provided the response is received by City before 5:00 p.m., within ten (10) working days after the Bid Protest Deadline or after receipt of the bid protest, whichever is sooner (the

“Response Deadline”). The response must include all supporting documentation. Material submitted after the Response Deadline will not be considered. The response must include the name, address and telephone number of the person representing the protested bidder if different from the protested bidder. Protested bidder must concurrently transmit a copy of the response and all supporting documents by fax or by e-mail, by or before the Response Deadline, to the protesting bidder and any other bidder who has reasonable prospect of receiving an award depending upon the outcome of the protest.

The procedure and time limits set forth in this section are mandatory and are the bidder’s sole and exclusive remedy in the event of bid protest. The bidder’s failure to comply with these procedures shall constitute a waiver of any right to further pursue a bid protest, including filing a Government Code Claim or initiation of legal proceedings.

15.2 The address for submitting protests is:

City of Morgan Hill
Community Services
17575 Peak Avenue
Morgan Hill, California, CA 95037
Attn: Chris Ghione

16 GENERAL INFORMATION

- 16.1** The City reserves the right to accept or reject any item or group(s) of items of a response. The City also reserves the right to waive any informality or irregularity in any proposal. The City reserves the right to request clarification to any portion of any response and to include the clarification to the response as an addenda after receipt at its sole discretion. Additionally, the City may, for any reason, decide not to award an agreement as a result of this RFP or cancel the RFP. The City shall not be obligated to respond to any proposal submitted, nor be legally bound in any manner by submission of the proposal.
- 16.2** The City is not required to accept the lowest price proposal. Responses will be evaluated to determine the most advantageous proposal on a variety of factors including but not limited to price, implementation costs, implementation timeline, design quality, features and performance.
- 16.3** Final award shall be contingent upon reaching an agreement on software licensing terms, if applicable.
- 16.4** Do not include sales tax in your price quotation. The City will work with the selected supplier to add sales tax as appropriate and will incorporate it into the Purchase Order.
- 16.5** Statistical information contained in this RFP is for informational purposes only. The City shall not be responsible for the complete accuracy of said data.

16.6 The City reserves the right to verify any information provided during the RFP process and may contact references listed or any other persons or entities known to have contracted with the Proposer.

16.7 The City will require financial statements for the last two fiscal years as certified by an independent Certified Public Accountant. Do not submit these documents unless they are requested.

17. ADDENDA AND INTERPRETATION

17.1 The City reserves the right to issue addenda prior to Bid Time. Any addenda issued prior to Bid Time shall constitute part of this RFP.

17.2 The City shall not be responsible for nor be bound by any oral instructions, interpretations or explanations issued by the City or its representatives. Should discrepancies or omissions be found in this RFP or should there be a need to clarify the RFP, requests for clarification may be sent via e-mail or fax to the attention of the contact named in Section 6.

17.3 Proposer requests for clarification shall be deliverable as stated in Section 8. Any City response to a request for clarification will be made in the form of an addendum to this RFP.

18 CITY ASSETS

Access to any City assets as part of a proposal shall be considered non-exclusive.

19 EXAMINATION OF PROPOSED MATERIAL

The submission of a proposal shall be deemed a representation and certification by the Proposer that they have investigated all aspects of the RFP, that they are aware of the applicable facts pertaining to the RFP process, its procedures and requirements, and that they have read and understood the RFP. No request for modification of the statement shall be considered after its submission on grounds that Proposer was not fully informed as to any fact or condition.

20 CODE ADHERENCE, PERMITS and FEES

Contractor shall agree to abide by all laws, rules and regulation of the United States, State of California, Santa Clara County, and the City of Morgan Hill, securing all necessary licenses and permits in connection with the resulting contract at no additional cost to the City.

21 TERMS AND CONDITIONS OF AGREEMENT

21.1 Upon conclusion of the RFP process, City staff will make a recommendation to the City Council regarding the selection based upon the evaluation of the proposals. The City will enter negotiations with one or more Proposer(s). Proposer(s) shall enter into a contract with the City in substantial conformity with the selected proposal and the form of the City's Standard Terms and Conditions. The Exemplar Agreement (to be provided to finalist(s) upon Award of RFP), outlines the City's standard terms and conditions as part of the agreement between the City and the successful Proposer. The City reserves the right to negotiate project deliverables and associated costs.

21.2 All agreements will require the Proposer to adhere to the terms of their proposal and to act in accordance with all applicable laws and regulations.

21.3 An agreement shall not be binding or valid with the City unless and until it is executed by authorized representatives of the City.

22 REJECTION OF BIDS AND AWARD OF CONTRACT City reserves the right, acting in its sole discretion, to accept or reject any and all bids, or to abandon the work entirely. City reserves the right to select one or more providers. Contract(s) will be awarded by City Council, if at all, within sixty (60) calendar days after conducting interviews based on the bid most advantageous to the City.

23 EXECUTION OF CONTRACT Contractor selected through the RFP process will be expected to execute a formal Contract with the City of Morgan Hill for the provision of the requested service. Entering into contract with the City of Morgan Hill will require compliance with all Proposal Attachments, which includes insurance requirements and defense and indemnification. Submission of a signed proposal will be interpreted to mean respondent has agreed to all the terms and conditions set forth in the pages of this RFP. Contractor must submit any and all exceptions to this RFP with its proposal, clearly identifying the exception, including the page number and section number, as appropriate. Contractor should note that the submittal of an exception does not obligate the City to revise the terms of this RFP or any resulting agreement. The City will not consider any exceptions that are not identified in the proposal.

24 INSURANCE REQUIREMENTS If awarded the contract, the Contractor may need to procure and provide proof of insurance coverage. If proposer's scope of work involves access to or entry upon a City-owned property or right of way by proposer and/or its contractors, agents, employees, or subcontractors, proposer must meet the City's insurance requirements as outlined in Attachment 5 Insurance Requirements.

25 INDEMNIFICATION If awarded the contract, the Contractor will be requirement to agree to the defense and indemnification as outlined in Attachment 6 Defense and Indemnification.

26 PUBLIC NATURE OF PROPOSAL MATERIAL

26.1 All correspondence with the City including responses to this RFP will become the exclusive property of the City and will become public records under the California Public Records Act (Cal. Government Code section 6250 et seq.) All documents that you send to the City will be subject to disclosure if requested by a member of the public. There are a very limited number of narrow exceptions to this disclosure requirement.

26.2 Therefore, any proposal which contains language purporting to render all or significant portions of their proposal “Confidential”, “Trade Secret” or “Proprietary”, or fails to provide the exemption information required as described below will be considered a public record in its entirety subject to the procedures in Section 24.5.

26.3 Do not mark your entire proposal as “confidential”.

26.4 The City will not disclose any part of any proposal before it announces a recommendation for award, on the ground that there is a substantial public interest in not disclosing proposals during the evaluation process. After the announcement of a recommended award, all proposals received in response to this RFP will be subject to public disclosure. If you believe that there are portion(s) of your proposal which are exempt from disclosure under the Public Records Act, you must mark it as such and state the specific provision in the Public Records Act which provides the exemption as well as the factual basis for claiming the exemption. For example, if you submit trade secret information, you must plainly mark the information as “Trade Secret” and refer to the appropriate section of the Public records Act which provides the exemption as well as the factual basis for claiming the exemption.

26.5 Although the California Public Records Act recognizes that certain confidential trade secret information may be protected from disclosure, the City of Morgan Hill may not be in a position to establish that the information that a Proposer submits is a trade secret. If a request is made for information marked “Confidential”, “Trade Secret” or “Proprietary”, the City will provide Proposers who submitted the information with reasonable notice to seek protection from disclosure by a court of competent jurisdiction. The City will not be responsible for any legal or other costs incurred by Proposers seeking to shield a portion of their proposal from public disclosure.

27 NON-DISCRIMINATION/NON-PREFERENTIAL TREATMENT The successful Proposer agrees that there shall be no discrimination against, or segregation of, any

person, on account of race, sex, color, age, religion, sexual orientation, actual or perceived gender identity, disability, ethnicity, national origin, marital status, or family status, in connection with or related to the performance of Morgan Hill contracts.

28 CITY BUSINESS LICENSE. The successful respondent will be required to obtain a City of Morgan Hill Business License at its own expense.

ATTACHMENT 1 - STATEMENT OF REQUIREMENTS

1. BACKGROUND/OVERVIEW

The City of Morgan Hill is seeking proposals for a comprehensive Service Request Management (SRM)/Work Order/Customer Relationship Management (CRM) solution. Ideally, one software solution (preferably cloud-based) could process all Service Request types within its SRM/Work Order/CRM system. The software solution must integrate with GIS and be scalable, with robust reporting capabilities, and the ability to integrate with existing and future work order systems and business software applications. The proposed solution must meet the needs of a diverse set of City employees in service to the public and in support of their requests. The proposed solution will be accessible to and used by the public to make requests and must meet their needs.

2. PROJECT GOALS

- 2.1. Deploy a multi-channel software solution (web, email, mobile, app., etc.) that enables internal and external customers to efficiently submit Service Requests to the City for processing.
- 2.2 Automatic routing of Service Requests, based on picklists selected in web or mobile CRM, to SRM and Work Order workflow engine, resulting in Work Order creation, assignment and completion in the appropriate work order system.
- 2.3 Automatic notification of assigned/updated/completed Work Order from SRM workflow engine with automatic updates to the customer on the status of their Service Request, via the customer's preferred method of communication.
- 2.4. GIS integration/mapping capabilities to enable the submission and status tracking of location-based Service Requests and to display work orders within a given geography.
- 2.3. Integration with other business systems such as Tyler Incode and Sedaru Omni.
- 2.4 Fleet/asset management and tracking capabilities
- 2.5. 24x7 access to Service Request information.
- 2.6. Provide the public, staff and Council with statistics and reporting regarding Customer Services in the community.
- 2.7. Provide rich, multi-channel, communication methodology for the city to communicate with the public.
- 2.8. Provide a knowledge base and deliver self-help capabilities.

2.9 Mass email notification functionality and automated communication features.

2.10 Incorporate current best practices for security including security that is consistent with the current standard in the industry for a similar project which includes external and internal customers.

3. SOLUTION REQUIREMENTS

The following requirements define specific features/functions of the proposed solution. **Responses for this section are required and must be returned by the Proposer in the accompanying Excel spreadsheet. Additional pages may be attached, with a reference to specific Item Number(s) in the Excel spreadsheet, as a supplement to the spreadsheet response.**

Each requirement has been assigned a priority code as defined below:

- | | | |
|---|-------------------|---|
| H | High Importance | Morgan Hill must have this feature to fully accomplish its business objectives. |
| M | Medium Importance | Including this feature will provide significant benefits to Morgan Hill in accomplishing its business objectives |
| I | Information Only | Unknown value to Morgan Hill; for information only. Additional Pages with Answers to these questions may be attached, as desired. |

INSTRUCTIONS: Proposers are to indicate the proper response code ('Y' for Yes or 'N' for No) in the space provided to the right of the Requirement Description. In addition, proposer must provide the applicable Priority Code in the associated column. Priority Code definitions are:

- A This requirement currently exists as either baseline functionality or a configuration option in a version of the product that is in production use in an environment comparable to Morgan Hill and can be demonstrated.
- B This requirement will be available for production use prior to unit testing at Morgan Hill and will be incorporated at no additional charge as part of the baseline product.
- C This requirement is not currently available but can be provided as an enhancement to the baseline product or as a modification.
- D This requirement is not included in the product solution.

For "H" priorities, "C" Priority Code responses must include itemized costs for each enhancement.

All "B" Priority Code responses must include the version and scheduled release date for the requirement to be fully met.

Item #	Requirement Description	Vendor Resp (Y/N)	Priority (H, M, I)	Priority Code (A, B, C, D)	Comments/Explanation
1.1	Technical Requirements				
	Design				
1.1.1	Please describe the integration between your Service Request Management and Customer Relationship Management solutions.		H		
1.1.2	Does the solution present real-time data from the integrated SRM/Work Order/CRM systems (e.g., Service Request type, status, etc.)?		H		
1.1.3	Does the solution use a Responsive Web Design (RWD)?		H		
	Does the solution's RWD scale to support:				
1.1.4	➤ Windows Computers and Tablets?		H		
1.1.5	➤ iPads?		H		
1.1.6	➤ Android Tablets?		H		
1.1.7	➤ iPhones?		H		
1.1.8	➤ Android Phones?		H		
1.1.9	➤ Other Devices (specify any limitations)?		M		
1.1.10	Does the solution support personalization by the City (e.g., wallpaper, content, fonts, colors, etc.)?		H		
1.1.11	Does the solution support an open source content management platform?		M		

Item #	Requirement Description	Vendor Resp (Y/N)	Priority (H, M, I)	Priority Code (A, B, C, D)	Comments/Explanation
1.1.12	Does the solution support the City changing content without vendor involvement (explain what can be changed by Morgan Hill)?		H		
1.1.13	Please describe the City's ability to brand the mobile/Web/public-facing components of the solution.		I	N/A	
1.1.14	Does the solution support Page Refresh functionality?		H		
1.1.15	Does the solution support Page Forward and Page Back functionality?		H		
1.1.16	Does the solution run in a virtual environment (if on premises)?		M		
1.1.17	Does the solution run in a cloud environment?		M		
1.1.18	Are APIs and standards, such as Rest, Soap and Open311 supported?		H		
1.1.19	Does the API functionality for your solution provide 'codeless integrations?'		M		
1.1.20	Please describe the APIs your solution supports (capabilities, standards, etc.)		I	N/A	
1.1.21	Please describe if your product uses Address standardization/verification to minimize errors in capturing location data		I	N/A	
1.1.22	Are reminders for follow up action integrated with Outlook calendars?		I	N/A	

Item #	Requirement Description	Vendor Resp (Y/N)	Priority (H, M, I)	Priority Code (A, B, C, D)	Comments/Explanation
1.1.23	Is there encryption of data at rest and in transit? If so, please describe these security features of the solution.		I	N/A	
1.1.24	Role-based access control to allow confidentiality of communications between departments or council districts?		I	N/A	
1.1.25	Is Auto Response supported? If so, list the communications channel you support for auto response (Email, SMS, Mobile App, etc.)?		I	N/A	
1.1.26	What analytics does your Service Request Management/Work Order System offer?		I	N/A	
1.1.27	What analytics does your Customer Relationship Management System offer?		I	N/A	
1.1.28	Please describe in detail the dashboard components of your solution. Does the dashboard allow for the integration of data from external sources such as a web service?		I	N/A	
1.1.29	Please describe the mapping and GIS capabilities of the solution (Google or Bing Maps for example).		I	N/A	
1.1.30	Does your solution support creating an HTML-based contact form for each council district that directly inputs requests into the SRM/CRM?		I	N/A	
1.1.31	Does the solution use a consistent date format across all panels?		I	N/A	
	Does the solution support the following authentication protocols?				

Item #	Requirement Description	Vendor Resp (Y/N)	Priority (H, M, I)	Priority Code (A, B, C, D)	Comments/Explanation
1.1.32	➤ LDAP?		H		
1.1.33	➤ Kerberos?		H		
1.1.34	➤ OAuth2?		H		
1.1.35	➤ SAML?		H		
Operating Systems					
	Does the solution run under the following Operating Systems (specify supported versions)?				
1.1.36	➤ Microsoft Windows Server?		H		
1.1.37	➤ Linux?		I	N/A	
1.1.38	➤ Others (specify)?		I	N/A	
Application Servers					
	Does the solution support the following Java Application Servers (specify supported versions)?				
1.1.39	➤ IBM WebSphere?		I	N/A	
1.1.40	➤ Apache Tomcat?		I	N/A	
1.1.41	➤ Others (specify)?		I	N/A	
HTTP Servers					
1.1.42	Microsoft IIS?		H		
1.1.43	➤ IBM HTTP Server?		I	N/A	
1.1.44	➤ Apache HTTP Server?		I	N/A	
1.1.45	➤ Others (specify)?		I	N/A	

Item #	Requirement Description	Vendor Resp (Y/N)	Priority (H, M, I)	Priority Code (A, B, C, D)	Comments/Explanation
	Database Servers				
	Does the solution support the following Database Servers (specify supported versions)?				
1.1.46	➤ Microsoft SQL Server (specify versions supported)?		H		
1.1.47	➤ Microsoft SQL Server Express?		I	N/A	
1.1.48	➤ MySQL Server?		I	N/A	
1.1.49	➤ Others (specify)?		I	N/A	
	Browser Support				
	Is your product compliant with the following browsers? For each, please describe the latest version supported and any known version or other limitations.				
1.1.50	➤ Microsoft Internet Explorer?		H		
1.1.51	➤ Microsoft Edge?		H		
1.1.52	➤ Mozilla FireFox?		H		
1.1.53	➤ Google Chrome?		H		
1.1.54	➤ Apple Safari?		H		
1.1.55	➤ Others (specify)?		M		
1.1.56	Is your solution ADA compliant?		H		
	System Integration				
	Does the solution have standard web services for integration with?				

Item #	Requirement Description	Vendor Resp (Y/N)	Priority (H, M, I)	Priority Code (A, B, C, D)	Comments/Explanation
1.1.57	➤ Esri/ArcGIS?		H		
1.1.58	➤ GIS/mapping capabilities to enable the submission and status tracking of location-based Service Requests and to display work orders within a given geography.		H		
1.1.59	➤ Esri integration for Outage Management - which Outage Management Systems are supported?		I		
1.1.60	➤ Tyler Incode System (Utility Billing) v2017.8.86		I		
1.1.61	➤ Sedaru Omni v X.X for utility maintenance?		I		
1.1.62	➤ Infosend for utility bill images?		I		
1.1.63	➤ Laser Fiche Document Imaging System?		I		
1.1.64	➤ Track-It Development Services Software?		I		
1.1.65	➤ O365 Mail Server?		H		
1.1.66	➤ SMS Server?		H		
1.1.67	Please describe integrations with Microsoft O365 Suite that your solution may offer		I	N/A	
1.1.68	Does the solution integrate with or replace existing work order systems (to achieve greater efficiency and enhance customer service)?		H		
1.1.69	Does the solution support single sign-on for City employees to authenticate using Active Directory credentials? If so, please describe the integration.		M		

Item #	Requirement Description	Vendor Resp (Y/N)	Priority (H, M, I)	Priority Code (A, B, C, D)	Comments/Explanation
1.1.70	Please describe any Computer Telephony Integration (CTI) capabilities your solution supports		M		
	FAQs and Help				
	Does the solution provide "FAQ" and "Help" features, including?				
1.1.71	➤ Bayesian model content management (non-static, using prior events to predict next steps)?		M		
1.1.72	➤ Federated site search (e.g., simultaneous search of FAQs, help, archived articles, etc.)?		M		
1.1.73	➤ Analytics regarding customer searches?		M		
1.1.74	➤ Tools to control/enhance content?		M		
1.1.75	➤ Seamless access across Web and Mobile?		M		
1.1.76	➤ Hover and drill down based on keywords?		M		
1.1.77	➤ Seamless integration into a chat session?		M		
1.1.78	➤ Seamless integration into an IVR system?		I	N/A	
1.1.79	➤ Seamless integration into other contact channels (e.g., social media, etc.)?		I	N/A	
1.1.80	➤ Does the solution provide customer content history to the other channels (e.g., a CSR has visibility into what a customer was asking)?		H		
1.1.81	➤ Does the solution support a moderated self-help forum capability?		I	N/A	

Item #	Requirement Description	Vendor Resp (Y/N)	Priority (H, M, I)	Priority Code (A, B, C, D)	Comments/Explanation
	Multi-Language Support				
1.1.82	Does the solution provide a "multi-language" capability (e.g. Spanish, Vietnamese, etc.)?		M		
	Does the solution translate the following to the selected language?				
1.1.83	➤ Data labels and static content?		M		
1.1.84	➤ Dynamic content from the Content Management System?		M		
1.1.85	➤ FAQs?		M		
1.1.86	➤ Help text?		M		
1.1.87	➤ Data retrieved from the CIS?		I	N/A	
	Mobile App				
1.1.88	Mobile Application supports at minimum IOS and Android?		H		
1.1.89	Does the mobile app support all the features that the Web app supports?		M		
	Is the product compliant with the following smart phones (describe any known version or other limitations)?				
1.1.90	➤ iPhone iOS (latest version)?		H		

Item #	Requirement Description	Vendor Resp (Y/N)	Priority (H, M, I)	Priority Code (A, B, C, D)	Comments/Explanation
1.1.91	➤ Android (latest version)?		H		
1.1.92	➤ Windows (latest version)?		H		
1.1.93	Does the solution support a responsive web design (RWD) in lieu of a separate mobile application?		H		
	Security				
1.1.94	Does the solution support emerging security technologies such as fingerprint, retinal scan, voice recognition, and keystroke analysis, to support future regulatory requirements?		M		
1.1.95	Can minimum requirements for the User ID be established and enforced via a system rule (e.g., 8 character with at least one number or valid email address)?		H		
1.1.96	Can minimum requirements for the password be established and enforced via a system rule?		H		
1.1.97	Does the solution support two-factor authentication (e.g., confirmation of email receipt)?		H		
1.1.98	Does the solution support a required password change after a City-defined time frame?		M		
1.1.99	Does the solution require additional authentication the first time a customer attempts access from a new IP address?		M		
1.1.100	In the event of a security breach, does the solution support forcing the customers to change their passwords?		M		

Item #	Requirement Description	Vendor Resp (Y/N)	Priority (H, M, I)	Priority Code (A, B, C, D)	Comments/Explanation
1.1.101	Additional security systems that Proposer can provide and/or recommend achieving standard in the industry level of security.		M		
1.1.102	Does the solution provide content filtering when a request is submitted (e.g. profanity)?		I		
1.2	Functional Requirements				
	Product				
1.2.1	Unique ID created/assigned for each Service Request		H		
1.2.2	Automatic routing of service request based on selected picklist item		H		
1.2.3	Does the solution provide the ability to add business processes?		H		
1.2.4	Does the solution have custom workflow creation functionality?		H		
1.2.5	Does the solution offer the ability to create a professional user interface?		M		
1.2.6	Does the solution offer the ability to add HTML, JavaScript, and jQuery to the Web pages?		M		
1.2.7	Submission of Service Requests by email, Web, API or mobile application		H		

Item #	Requirement Description	Vendor Resp (Y/N)	Priority (H, M, I)	Priority Code (A, B, C, D)	Comments/Explanation
1.2.8	Submission of Service Requests from social media		M		
1.2.9	Ability to submit attachments to Service Requests		H		
1.2.10	SMS communication ability for SRM/CRM		H		
1.2.11	Ability for external/public user to track their Service Request/Work Order by logging into the system?		H		
1.2.12	Please describe how the <u>external/public user</u> can be notified with status updates and messages related to their Service Request/Work Order (e.g. email, automated phone call, SMS, etc.)		H		
1.2.13	Please describe how the <u>internal/city staff user</u> can be notified with status updates and messages related to their Service Request/Work Order (e.g. email, automated phone call, SMS, etc.)		H		
1.2.14	Route optimization for Service Requests/Work Orders based on the closest field personnel for a Service Request type		M		
1.2.15	Are there any limits to the number of groups that can use SRM/CRM functionality? The city has multiple departments who will need workgroup security.		I	N/A	

Item #	Requirement Description	Vendor Resp (Y/N)	Priority (H, M, I)	Priority Code (A, B, C, D)	Comments/Explanation
1.2.16	Can the platform push contextual data to mobile devices from City data sources such as community programs offered at a partial time or in a part of the City?		I	N/A	
1.2.17	Ability for City staff to open Service Requests on behalf of the public to ensure responses are returned to the original requestor		H		
1.2.18	Ability to link multiple customers to a Service Request/Work Order		H		
1.2.19	Ability to link multiple City staff members to a Service Request/Work Order		H		
1.2.20	Ability for each constituent to add notes that are time and date stamped		M		
1.2.21	Ability to create reminders for follow up action		H		
1.2.22	Ability to add "topic tags" to contacts on topics of interest such as illegal dumping, taxis, etc.		M		
1.2.23	Ability to create related CRM records for spouses, children, parents, etc.		M		
1.2.24	Ability to categorize contacts such as Business, Veteran, Resident, Business owner, neighborhood association, etc.		M		
1.2.25	Ability for Customer Service Representatives to review and route request submitted by the public		H		

Item #	Requirement Description	Vendor Resp (Y/N)	Priority (H, M, I)	Priority Code (A, B, C, D)	Comments/Explanation
1.2.26	Ability for staff to reassign Service Requests		H		
1.2.27	Ability to assign or delegate Service Requests to staff in a particular workgroup		H		
1.2.28	Ability to follow and/or comment on a Service Request		H		
1.2.29	Workflow engine that converts Service Request to Work Order and manages assignment to and completion of Work Order in the appropriate work order system		H		
1.2.30	Automatic notification of assigned/updated/completed Work Order from SRM/workflow engine to automatically update customer on the status of their Service Request.		H		
1.2.31	Contextual city notification of service information, based on location, time of day, day of week etc.		M		
1.2.32	Automation of public communications (e.g. auto-reply to communicate Service Request/Work Order status update and completion)		H		
1.2.33	Ability to submit requests with picture, geo-tagged with LAT/LOG		H		
1.2.34	Does the solution notify the customer of partially/fully completed requests via their preferred communication method?		H		
1.2.35	Does the solution allow City staff to view and/or complete partially completed requests?		H		

Item #	Requirement Description	Vendor Resp (Y/N)	Priority (H, M, I)	Priority Code (A, B, C, D)	Comments/Explanation
1.2.36	Does the solution provide for inquiry into pending field orders and Service Request status data?		H		
1.2.37	Does the solution provide for inquiry into pending work order and status data that is being performed in an external application?		I	N/A	
1.2.38	Does the solution provide for inquiry into pending permits and status data that's being performed in an external application?		I	N/A	
1.2.39	24x7 access to Service Request/Work Order information?		H		
1.2.40	Ability to search and view a map-based interface and see current Service Requests/Work Orders and status, to help reduce duplication?		M		
1.2.41	Does your product support bulk close and update for multiple reports of the same issue?		M		
1.2.42	Does your product offer an external knowledgebase for customer self-service to frequently asked questions?		H		
1.2.43	Does your product offer an internal knowledge base solution for City staff?		H		
1.2.44	Does the solution have an audit trail for SRM/CRM record updates and Service Requests?		H		

Item #	Requirement Description	Vendor Resp (Y/N)	Priority (H, M, I)	Priority Code (A, B, C, D)	Comments/Explanation
1.2.45	Can the City brand the mobile application with multiple brands (District 1 mobile app, District 2 mobile app, etc.) while maintaining an integrated backend?		M		
1.2.46	Internal Work Orders: Allow scheduled/recurring tasks on set days and regeneration of new tasks after task completion (e.g. preventative maintenance, tree trimming, pothole maintenance, etc.)		H		
1.2.47	Internal vs. External Service Request/Work Order: Clearly identify and differentiate external vs. internal Service Requests/Work Orders for reporting purposes		H		
	Email Capabilities				
1.2.48	Functionality to easily create email marketing campaigns / mass email content (e.g. City General information, District-specific information, power outage notification email)?		H		
1.2.49	Email templates for communicating frequent requests/issues?		I	N/A	
1.2.50	Rich HTML-based Email functionality?		I	N/A	
1.2.51	Ability to extract email addresses from the CRM?		H		
1.2.52	Ability for constituents to opt in or opt out of emails by areas of interest?		M		

Item #	Requirement Description	Vendor Resp (Y/N)	Priority (H, M, I)	Priority Code (A, B, C, D)	Comments/Explanation
1.2.53	Ability to integrate with CRM to send targeted emails to "topic tags" of interest such as illegal dumping, taxis, etc.		M		
1.2.54	Please describe how email sent to individual council staff can be brought into the CRM without losing the original submitter as the source of the request (in other words without forwarding).		I	N/A	
	Asset Management				
1.2.55	Preventative/recurring maintenance functionality for City assets		H		
1.2.56	Vehicle and Equipment inventory and maintenance functionality		H		
1.2.57	Value and depreciation schedule and management		H		
1.2.58	Reporting, including replacement scheduling/funding.		H		
1.3	Customer Experience				
1.3.1	Does the solution provide a "Remember User ID" check box option?		H		
1.3.2	Does the solution support Google or social media (e.g., Facebook) logins?		H		
1.3.3	Does the solution provide for a light authentication (Guest User)?		H		

Item #	Requirement Description	Vendor Resp (Y/N)	Priority (H, M, I)	Priority Code (A, B, C, D)	Comments/Explanation
	Does the solution provide a customer the ability to update the following via the Web with proper security access?				
1.3.4	➤ Web log on identifier (aka User ID)?		H		
1.3.5	➤ Password reset/forgot password?		H		
1.3.6	➤ Mailing addresses and effective dates?		H		
1.3.7	➤ Telephone numbers?		H		
1.3.8	➤ Email addresses?		H		
1.3.9	➤ Preferred method of notification preferences (e.g., mail, email, text)?		H		
1.3.10	➤ Preferred Name?		M		
1.3.11	➤ Social media accounts?		M		
1.3.12	➤ Other User Defined Information?		M		
	Data Storage, Reports, and Analytics				
	Does the solution store, monitor, and report real-time on?				

Item #	Requirement Description	Vendor Resp (Y/N)	Priority (H, M, I)	Priority Code (A, B, C, D)	Comments/Explanation
1.3.13	➤ Name		H		
1.3.14	➤ Address		H		
1.3.15	➤ Email		H		
1.3.16	➤ Phone Number		H		
1.3.17	➤ Customer Contact received via Web/IVR/SMS (any communication channel)?		H		
1.3.18	➤ Customer Contact awaiting a response?		H		
1.3.19	➤ Customer Contact completed (response sent)?		H		
1.3.20	➤ The date, time, and user of each follow-up action above?		H		
1.3.21	Ability to create custom reports		H		
1.3.22	Ability to add and report on custom fields?		H		
1.3.23	Ability to export reports via Excel, .pdf, etc.?		H		
1.3.24	Ability to export reports (Excel, .pdf, etc.)?		H		

Item #	Requirement Description	Vendor Resp (Y/N)	Priority (H, M, I)	Priority Code (A, B, C, D)	Comments/Explanation
	Guest Access				
1.3.25	Does the solution allow someone without a web account to request services and fill out forms (e.g., an anonymous customer)?		H		
	Customer Contacts				
1.3.26	Does the solution store or identify an email from a customer as a customer contact?		H		
1.3.27	Does the solution capture contact analytics from anonymous customers?		M		
	Customer Notification				
1.3.28	Does the solution allow all notifications to be customized (wording and content; logos, fonts, colors, etc.) by the City?		H		
1.3.29	Does the solution allow customer notifications to be selectively activated and deactivated by the City?		H		
1.3.30	Does the solution messaging support multi-language, based on a customer preference?		H		
	Test Environment and system backup				
1.3.31	Does the solution provide a test environment to test any change before applying it to the production environment?		H		

Item #	Requirement Description	Vendor Resp (Y/N)	Priority (H, M, I)	Priority Code (A, B, C, D)	Comments/Explanation
1.3.32	Please describe your solution backup process. How does the process work, and how often does the system get backed up?		H		
	Customer Survey				
	Does the solution provide for an automated customer satisfaction survey, at the completion of a Service Request, that includes?				
1.3.33	➤ Random selection of customers to survey?		M		
1.3.34	➤ Offered to all customers?		M		
1.3.35	➤ Scripted questions?		M		
1.3.36	➤ Capture of numerical ratings for the scripted questions?		M		
1.3.37	➤ Capture of free form comments?		M		
1.3.38	➤ Capture of follow-up action requests?		M		
1.3.39	➤ Statistical analysis of responses?		M		
	Does the solution provide the following analytics on external/public users?				

Item #	Requirement Description	Vendor Resp (Y/N)	Priority (H, M, I)	Priority Code (A, B, C, D)	Comments/Explanation
1.3.40	➤ How the external/public user arrived at the website/solution?				
1.3.41	➤ What device is being used to access the website/solution?				
1.3.42	➤ What browser is being used to access the website/solution?				
1.4	Additional Opportunities				
1.41	Please describe any other opportunities the City may have missed to transform its engagement and transparency efforts with the community using your solution.		I	N/A	
1.42	Please describe any additional systems and/or service providers that your solution integrates with that may be of benefit to the City		I		

ATTACHMENT 2 – EXISTING SYSTEM OVERVIEW

System Name	System Version	Description
Civic Plus	Aurora	City website-based forms for external customer Service Requests
Hippo	6.3	Internal work order system for assigning and processing maintenance SRs.
Tyler Incode	v2017.8.86	Utility system for billing, customer services, and field services.
Sedaru Omni	N/A	Preventive/recurring utility equipment asset management
Standalone utility	N/A	Work order system for processing utility SRs on City-owned property
Arbor Access	N/A	Third-party system for tree inventory/work order management
Tokay	N/A	Work orders for backflow management; integrates with Tyler Incode.
Scada	N/A	Utility system monitoring and management – reporting and controls.
Sensus	N/A	Advanced Metering Infrastructure (AMI) for water data and billing
Esri GIS	10.6.1	GIS that we envision being integrated with SRM/CRM
Track-It	9	Used by the Development Services Department to manage the development permitting process for planning, building, and land development engineering

Note: No comprehensive fleet management / asset management and inventory system is currently in place.

ATTACHMENT 3 - COMPANY BACKGROUND

To be completed by Proposer and submitted with Proposal

	Description	Response
1	Years in Operation	
	Number of years that company has been in operation and providing SRM/Work Order/CRM systems and services like the scope of services described in this RFP.	_____ Years
2	Office Locations	
	Number of total office locations.	_____ Locations
	Location of each office.	Street Address/City/State/Zip
	Location of corporate headquarters.	
	Location of office from which service will be provided to the City.	
3	Employees	
	Number of current full-time regular employees company wide.	_____ Employees
	Number of employees in office providing services to the City.	_____ Employees
4	Clients	
	Total number of clients (U.S.).	_____ Clients
	Total number of local government clients in California.	_____ Clients
	Total number of clients currently supported by office that will provide services to City.	_____ Clients

ATTACHMENT 4 – CUSTOMER REFERENCES

Complete the following information for a minimum of three references for which Proposer has provided comparable systems and professional services during the past five years. Local government agencies within California are preferred, and at least one reference shall be a municipality of comparable size and complexity to the City. The City reserves the right to contact references other than, and/or in addition to, those provided by proposers. The City shall not provide information received from references to proposers. Make additional copies of these pages or attach additional sheets if necessary.

Reference 1

Agency Name:	
Department Name:	
Address:	
Contact Person:	
Title:	
Telephone Number:	
E-Mail Address:	
Name and Version of Software Modules or Products Installed:	
Technology (including hardware platform, database platform, operating system, and whether on premise, SaaS, or Hosted):	
General Description of Services Performed:	
Dates for Performance (Go-Live Date, Project Duration in Months):	

ATTACHMENT 4 – CUSTOMER REFERENCES (CONT.)

Reference 2

Agency Name:	
Department Name:	
Address:	
Contact Person:	
Title:	
Telephone Number:	
E-Mail Address:	
Name and Version of Software Modules or Products Installed:	
Technology (including hardware platform, database platform, operating system, and whether on premise, SaaS, or Hosted):	
General Description of Services Performed:	
Dates for Performance (Go-Live Date, Project Duration in Months):	

ATTACHMENT 4 – CUSTOMER REFERENCES (CONT.)

Reference 3

Agency Name:	
Department Name:	
Address:	
Contact Person:	
Title:	
Telephone Number:	
E-Mail Address:	
Name and Version of Software Modules or Products Installed:	
Technology (including hardware platform, database platform, operating system, and whether on premise, SaaS, or Hosted):	
General Description of Services Performed:	
Dates for Performance (Go-Live Date, Project Duration in Months):	

ATTACHMENT 5
WAGE THEFT PREVENTION PROPOSAL CERTIFICATION

To be executed by Proposer and submitted with Proposal

All Contractors are expected to have read and understand the “Wage Theft Prevention Policy” adopted on July 26, 2017.

The undersigned Contractor hereby certifies that Contractor and its principals have__, have not__ been found by a final court judgement or final administrative action of an investigatory agency to have violated federal, state or local wage and hour laws within the past five years from the date of the submitted proposal or proposal. For each disclosed violation, the Contractor shall provide a copy of (i) the court order and judgment and/or final administrative decision; and (ii) documents demonstrating either that the order/judgment has been satisfied, or if the order/judgment has not been fully satisfied, a written and signed description of Contractor’s efforts to date to satisfy the order/judgment. The completed Certification shall be submitted by the Contractor to the City as a part of its proposal. The City, at its sole discretion, may disqualify a contractor based on one or more disclosed judgments consistent with the criteria set forth in the Policy.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct and that this certification is executed on _____ [date], at _____ [city], _____ [state].

s/_____

Print Name and Title

ATTACHMENT 6 INSURANCE REQUIREMENTS (page 1 of 3)

6. Insurance Requirements. CONSULTANT shall procure and provide proof of the insurance coverage required by this section in the form of certificates and endorsements. The required insurance must cover the activities of CONSULTANT, including its subcontractors, employees and agents, relating to or arising from the performance of any work or service under this Agreement, and must remain in full force and effect at all times during the period covered by this Agreement. The coverages may be arranged under a single policy for the full limits required or by a combination of underlying policies with the balance provided by excess or “umbrella” policies, provided each such policy complies with the requirements set forth herein. CONSULTANT further understands that the CITY reserves the right to modify the insurance requirements set forth herein, with thirty (30) days’ notice provided to CONSULTANT, at any time as deemed necessary to protect the interests of the CITY.

6.1. Insurance Types and Amounts.

6.1.1. Commercial General Liability (CGL). CONSULTANT shall maintain CGL against claims and liabilities for personal injury, death, or property damage providing protection in the minimum amount of: (i) one million dollars (\$1,000,000.00) combined single limit for any one accident or occurrence, or (ii) the maximum amount of such insurance available to CONSULTANT under CONSULTANT’s combined insurance policies (including any excess or “umbrella” policies), whichever is greater.

6.1.2. Automobile Liability. CONSULTANT shall maintain Automobile Liability covering all owned, non-owned and hired automobiles (if CONSULTANT does not own automobiles, then CONSULTANT shall maintain Hired/Non-owned Automobile Liability) against claims and liabilities for personal injury, death, or property damage providing protection in the minimum amount of: (i) one million dollars (\$1,000,000.00) combined single limit for any one accident or occurrence, or (ii) the maximum amount of such insurance available to CONSULTANT under CONSULTANT’s combined insurance policies (including any excess or “umbrella” policies), whichever is greater.

6.1.3. Workers’ Compensation Insurance and Employer’s Liability. CONSULTANT shall maintain Workers Compensation coverage, as required by law, in the minimum amount of: (i) one million dollars (\$1,000,000.00) for any one accident or occurrence, or (ii) the maximum amount of such insurance available to CONSULTANT under CONSULTANT’s combined insurance policies (including any excess or “umbrella” policies), whichever is greater. If CONSULTANT is self-insured, CONSULTANT shall provide its Certificate of Permission to Self-Insure, duly authorized by the Department of Industrial Relations.

6.1.4. Professional Liability.

ATTACHMENT 6 INSURANCE REQUIREMENTS (page 2 of 3)

6.1.4.1. If the performance of CONSULTANT's work or service under this Agreement involves professional and/or technical services (examples include, but are not limited to, architects, engineers, land surveyors, and appraisers), CONSULTANT shall procure and maintain either a claims made or occurrence Errors and Omission liability insurance in the minimum amount of: (i) one million dollars (\$1,000,000.00) each claim, or (ii) the maximum amount of such insurance available to CONSULTANT under CONSULTANT's combined insurance policies (including any excess or "umbrella" policies), whichever is greater. Further, if CONSULTANT maintains a claims-made policy, CONSULTANT shall provide written evidence of such insurance to the CITY for at least five (5) years after the completion of work performed under this Agreement.

6.1.4.2. If the performance of CONSULTANT's work or service under this Agreement relates to Information Technology or related services (examples include, but are not limited to computer programmers, software designers, hardware engineers, or other systems consultants), CONSULTANT shall procure and maintain a claims made Errors and Omission liability insurance, including Cyber Liability and Data Breach, in the minimum amount of: (i) one million dollars (\$1,000,000.00) each claim, or (ii) the maximum amount of such insurance available to CONSULTANT under CONSULTANT's combined insurance policies (including any excess or "umbrella" policies), whichever is greater.

6.2. Endorsements. CONSULTANT shall provide proof of the following endorsements, listed for each policy for which endorsements are required, as outlined below:

6.2.1. General Liability and pollution liability (when pollution liability applies).

6.2.1.1. The City of Morgan Hill, its elected or appointed officials, boards, agencies, officers, agents, employees, and volunteers are named as additional insureds;

6.2.1.2. the insurer waives the right of subrogation against the City of Morgan Hill and the CITY's elected or appointed officials, boards, agencies, officers, agents, employees, and volunteers; and,

6.2.1.3. insurance shall be primary non-contributing.

6.2.2. Workers Compensation.

If the performance of CONSULTANT'S work or service under this Agreement involves access to or activity on any property or premises owned or occupied by the CITY, including, but not limited to, CONSULTANT'S presence during site visits and meetings, then insurer waives the right of subrogation against the City of Morgan Hill and the

ATTACHMENT 6
INSURANCE REQUIREMENTS (page 3 of 3)

CITY's elected or appointed officials, boards, agencies, officers, agents, employees, and volunteers.

6.3. Qualification of Insurers. All insurance required pursuant to this Agreement must be issued by a company licensed and admitted, or otherwise legally authorized to carry out insurance business in the State of California, and each insurer must have a current A.M. Best's financial strength rating of "A" or better and a financial size rating of "VII" or better.

6.4. Certificates. CONSULTANT shall furnish CITY of Morgan Hill with copies of all policies or certificates as outlined herein, whether new or modified, promptly upon receipt. No policy subject to the CONSULTANT's agreement with the CITY shall be canceled or materially changed except after thirty (30) days' notice by the insurer to CITY. Certificates, including renewal certificates, may be mailed electronically to riskmgmt@morganhill.ca.gov or delivered to the Certificate Holder address provided herein

Certificate Holder address:

City of Morgan Hill

Attn: Risk Management

17575 Peak Avenue

Morgan Hill, CA 95037

ATTACHMENT 7 DEFENSE AND INDEMNIFICATION

- a.1. Defense and Indemnification. SERVICE PROVIDER shall, to the fullest extent permitted by law, indemnify, defend and hold harmless CITY, its elected or appointed officials, boards, agencies, officers, agents, employees, and volunteers (“INDEMNITEES”) from and against any and all claims, liabilities, expenses, liens, or damages of any nature, including liability for bodily injury, property damage or personal injury, and including reasonable attorneys’ fees and expenses, that arise out of, pertain to, or relate to the performance of an Agreement or the failure to comply with any obligations contained in an Agreement by SERVICE PROVIDER, and/or its agents, officers, employees, subcontractors, or independent contractors (“CLAIM”).
- a.2. Exceptions. SERVICE PROVIDER is not required to indemnify INDEMNITEES against liability for bodily injury, property damage or personal injury, or any other loss, damage or expense arising from the sole negligence or willful misconduct of the CITY.
- a.3. Not limited by insurance. The indemnity, defense and hold harmless provisions of an Agreement apply to all CLAIMs alleged against an INDEMNITEE, regardless of whether any insurance policies are applicable. Policy limits do not act as a limitation upon the amount of indemnification or defense to be provided by SERVICE PROVIDER.
- a.4. Right to Offset. CITY shall have the right to offset against any compensation due SERVICE PROVIDER under an Agreement any amount due CITY from SERVICE PROVIDER as a result of SERVICE PROVIDER’s failure to pay CITY promptly any indemnification arising under this Section and any amount due CITY from SERVICE PROVIDER arising from SERVICE PROVIDER’s failure either to (i) pay taxes on amounts received pursuant to an Agreement or (ii) comply with applicable workers’ compensation laws.

Interpretation. It is expressly understood and agreed that the obligation of the SERVICE PROVIDER to indemnify the INDEMNITEE shall be as broad and inclusive as permitted by the laws of the State of California and shall survive termination of any Agreement between INDEMNITEE and SERVICE PROVIDER.