Request for Proposals
Community Development System
RFP# 22-022

Responses Due:

August 18, 2022

3:00 p.m.

Central Standard Time

Submit Proposals to:

City of Keller

Attn: Ryan Lee

1100 Bear Creek Parkway

Keller, TX 76248

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1.0 INTRODUCTION AND VENDOR INSTRUCTIONS

1.1 Introduction

The City of Keller, Texas (referred to as "the City") invites your company to provide a proposal for the implementation of a comprehensive, turnkey, integrated Community Development System. Vendors may propose all or part of a full system solution either by offering all parts themselves or by subcontracting the modules or aspects they do not offer; the City will balance the functional fit of solutions offered with that of more complete solutions that reduce the ongoing burden of integration support. The City is open to consider solutions that are **either fully On-Premise or fully SaaS Cloud-based.**

Services associated with the implementation of the integrated Community Development System will include: project management, system design, hardware, any software customization to meet specifications, interface development, systems integration, data conversion, testing, implementation and training. It will also be the responsibility of the Vendor to provide full configuration of the workflows into the system.

1.2 City of Keller Background

Nestled comfortably in the heart of the Dallas-Fort Worth Metroplex, the City of Keller has gained national attention by pairing big-city conveniences and amenities with small-town roots and an emphasis on quality of life.

Blessed with a warm and welcoming atmosphere, an excellent school system, a wide variety of shopping and dining destinations, and award-winning city facilities, programs and services, Keller is Texas's Most Family-Friendly City — home to just under 46,000 residents within its 18.4 square miles.

The community's distinct business districts, historic Old Town Keller and the urban Keller Town Center, are just two of our unique economic engines. And the citywide parks and trails system, anchored by Big Bear Creek, offers recreation and mobility among the city's recreation and aquatics center, The Keller Pointe, and multiple sports facilities. The Keller Public Library offers more than 80,000 materials and a slew of online resources, and next door, a brand-new Keller Senior Activities Center brings senior citizens together for stimulating activities, emphasizing health and fellowship.

Recent accolades have included mentions as one of the "Best Small Cities in America," among the "Top 10 Places to Live in Texas," and among the "Best Places to Raise a Family in Texas." With the help of accredited police and fire departments, Keller is also consistently named among the state's and nation's safest cities.

The City of Keller is a home rule municipality operating under the council-manager form of government. The mayor and six council members — all elected at large to serve three-year terms — are responsible for setting vision and policy; passing ordinances and resolutions; adopting the annual budget; appointing boards, commissions and committees; and hiring the City Manager, City Secretary, City Attorney and Municipal Court Judge. An appointed City Manager oversees daily operations for the full-service organization, including managing a staff of approximately 343 full-time-equivalent positions and administering a roughly $100 million budget.

1.3 Project Intent

The City of Keller is currently seeking to replace its current CentralSquare Community Development (TRAKiT) system and acquire the following primary functionality: Planning and Zoning, Permitting and Inspections, Code Enforcement, and online Customer Portal functionality.

1.3.1 Project Scope

Proposals are being sought through this RFP for a project that includes acquisition of:

- Planning and Zoning Capabilities (i.e., Plan Applications, Development Review, Electronic Plans, Plan Review, Fee Payments, Plan Reporting, Zoning/Re-zoning);
- Permitting and Inspections Capabilities (i.e., Request for Service, Permit Tracking, Permit Approval & Issuance, Inspections, Scheduling, Fee Calculation, Permit Reporting);
- Code Enforcement Capabilities (i.e., Violation Reporting, Code Violation Process, Fee Calculation, Lien Tracking);
- Integrated and robust online customer self-service capabilities;
- Mobile inspection software;
- Integration to current City systems;
- Full configuration of all workflows;
- Full data conversion and clean up by the Vendor;
- Training (i.e., End-User, Admin, Security, Organizational Change Management); and
- Maintenance services.

The City recognizes that this project will have a significant impact on the City staff and is looking to minimize that impact as much as possible. To the extent vendor is able, the City is looking for the vendor to conduct a thorough business analysis at the start of each module and to provide the City with a pre-configured system using its best practices and experience as a model. **The Vendor will be responsible to provide complete workflow/business process configuration into the new system.** The City is expecting to review and test this pre-configured system, requesting minimal changes as required.

With all systems, the City is looking for the following capabilities, as appropriate:

- Integrated and robust customer self-service capabilities;
- Modern and intuitive workflow automation; and
- Interfaces to certain City systems.

Overall services associated with the implementation of all proposals must include: project management, system design, hardware, any software customization to meet specifications, interface development, systems integration, data conversion, testing, implementation, training and explanation of maintenance coverage (i.e., 24/7/365). The City is looking for each vendor to provide a half-time project manager for the duration of the project and expects the project manager to be onsite at least every other month for a two-day onsite project review with the City; onsite visits should include kickoff and go-live for each module.

1.3.2 City's Preferred Solution

The City plans to implement an industry standard, commercial-off-the-shelf (COTS) modular software solution that is configurable by the City staff and requires few, if any, modifications to the software to meet the City's needs.

The City will choose the best functional fit to meet its needs. The City understands that no one vendor may be able to provide the optimal solution. Consequently, the City is soliciting and will evaluate solutions that provide one or more components of the solution. These solutions will be evaluated on the basis of their ability to meet the City's functional requirements and share data between other components as needed to meet the City's objectives as outlined in 1.3.3 below.

The City will either consider On-Premise or SaaS Cloud-based solutions. The City has standardized on the Microsoft Operating Systems platform and, as such, is seeking solutions that currently operate in the Windows 10/11 desktop, Windows Server 2019, and iOS Apple iPad environments. Solutions that incorporate Web Services Internet/Intranet technology will also be considered.

The City is looking to establish a long-term relationship with a vendor. As such, the City is looking for a vendor whose primary business is the Public Sector and has a proven track record of:

- Financial stability;
- Successfully implementing its system with similar sized cities to Keller and in Texas; and
- Sustained history of significant re-investment in its software to keep it modern in terms of functionality and platform.

It is critical to the success of this project that the vendors perform extensive business analysis and provide process improvement recommendations to take full advantage of the proposed solution's potential. Solutions that are inflexible and require complete changes to our existing processes are unlikely to be selected. A balanced approach that allows for configuration changes to adjust the software to meet our needs is the most likely to succeed.

1.3.3 City Objectives

The objectives of this deployment include:

- Fit of application to work process through a high degree of configuration parameters;
- Streamlining of the electronic data collection and document review process;
- Provision of customer self-service capabilities for Online Application Submittal, Online Payments, Inspections, Permitting, Status Review, GIS integration and other functions;
- Automate and integrate functions currently requiring manual intervention;
- Improved field personnel utilization and effectiveness through tighter integration of the field electronic data collection with the backend databases;
- ESRI GIS Integration to allow drill down on all relevant information through the entry of unique geographic identifier;
- Modernization of the existing systems architecture in order to minimize long-term support and development costs;
- Integrate with core City systems to share and transfer data to reduce duplicate data entry and improve overall accuracy of information;
- Minimization of the multiplicity of systems and databases to improve data management;
- Have an integration with LaserFiche for file scanning, storage, electronic forms processing, and workflow;
- Provision for improved data analysis and reporting for average users to use, customizable reporting tools and modern analytical toolsets; and
- Provision for rapid recovery of the Community Development System from a critical event.

Additionally, the City of Keller seeks assurance of:

- Effective Project Management by the Vendor and the Vendor's Project Manager within the Vendor's organization;
- Long-term useful life of the system;
- Vendor's commitment to keeping the system state-of-the-art; and
- Competitive prices.

The City of Keller desires to procure the most appropriate systems within its financial means from a qualified vendor at a firm, fixed price. The City of Keller prefers to purchase an existing system that is in use by other similar agencies and is proven effective. Contracts shall be made only with a responsible Vendor who possesses the ability to perform successfully under the terms and conditions of this proposed procurement. Consideration shall be given to such matters as software and hardware quality, Vendor integrity, record of past performance including prior successful implementation of proposed products, along with financial and technical resources.

Each firm submitting a proposal must have established a state and/or national reputation for the planning, supplying, installing and maintaining of their systems. Firms are required to provide, as part of their normal updates, all changes to federal and state reporting forms and reports as they issued by those agencies.

The City reserves the right to acquire any and/or all system components proposed. The City may also exercise the option to procure third-party components directly using vendor-provided specifications (e.g., servers, field mobility devices).

It is important for the proposers to understand that the City has invested in its infrastructure and expects to leverage that infrastructure. The Vendor is expected to (a) specify hardware requirements and network requirements as part of its proposal, (b) propose hardware to fully enable its system, and (c) propose services that enable it to certify that the City meets its minimum standards so that the Vendor can comply with performance requirements specified in this RFP.

1.4 Key System Functions

Certain key system functions are of particular interest to the City. These must be shown during the demonstration phase of the evaluation process.

- Overall System

  - Single integrated system data flow with minimized reentry
  - Easy, intuitive, and powerful user-driven reporting and analytics
  - GIS integration
  - Fully functional and integrated employee and citizen self-service capabilities
  - Full integration with document management and imaging capabilities
  - Integrated task alerting functionality (e.g., configurable portal)
  - Operate upon converted and newly entered data
  - Single sign-on for all modules of the integrated system linked to Active Directory

- Planning and Zoning

  - Electronic Plan Review
  - Automatic notification of permit status for staff assigned to permit
  - Alerts for comments that are due
  - Automated workflows built in the system to assist through application process
  - Ability to produce user-friendly maps for the City website
  - Ability to verify zoning on a particular address for a new plan application

- Permitting and Inspections

  - Geolocation fee lookup and advanced fee assessment calculation
  - Ability for staff to view where they are in the process for a permit
  - Pervasive data capture in the field (in case of connectivity issues)
  - Online permitting status/fee portal for customers
  - Robust citizen portal that limits contractor submittals without all appropriate documents

- Code Compliance

  - Automated notifications for code violations
  - Ability to automatically create notification letters within the system
  - Pervasive data capture in the field (in case of connectivity issues)

1.5 RFP Outline

The following table provides an outline of the RFP.

#	Section	Purpose
1.0	Introduction & Instructions	This section contains background information, instructions on how to submit a proposal and a guideline for the proposal contents and format.
2.0	Background and New Systems Objectives	This section provides an operational background of the agency and a description of the current systems, as well the requirements for new ones.
3.0	Infrastructure Requirements	This section provides the requirements for hardware and network.
4.0	Service & Maintenance Requirements	This section contains requirements for ongoing system maintenance and other services over the life of the system(s).
5.0	Performance Requirements	This section contains requirements for the initial and ongoing performance of the system(s).
6.0	Implementation Requirements	This section contains requirements for the conduct and completion of the implementation period.
7.0	Contract Requirements	This section defines the general business relationship to be established with the Vendor.
8.0	Price Requirements	This section describes the pricing details required and the payment and other related terms.
	Attachments	Attached files: ■ A1 - Proposal Response Forms ■ A2 - Functional Requirements Response Forms ■ A3 - City's Standard Terms and Conditions

1.6   Proposal Process Instructions

1.6.1   Significant Dates

It is intended that the following dates will govern this procurement. They are subject to change at the discretion of the City of Keller.

Activity	Date/Time
RFP Issue Date	July 18, 2022
Pre-Proposal Virtual Meeting	August 02, 2022, 10:00–11:00 AM CST
Final Written Questions Due	August 09, 2022, 3:00 PM CST
Reponses Addenda Posted	August 11, 2022
Proposal Submission Deadline	August 18, 2022, 3:00 PM CST
Shortlist Notification	September 2022
Onsite Demonstrations	October 2022
Contract Negotiations	November 2022
Contract Award	December 2022

1.6.2   Communication with the City of Keller

All communications regarding this RFP from Vendors and other sources must be directed to the RFP Coordinator as follows:

Title	Support Services Manager
Name	Ryan Lee
Address	City of Keller 1100 Bear Creek Parkway Keller, TX 76248
Email	rlee@cityofkeller.com

Contact with the City of Keller or any of their employees regarding this procurement is expressly prohibited without prior consent of the RFP Coordinator.

1.6.3   Pre-Proposal Virtual Meeting & Questions

The purpose of the Pre-Proposal Virtual Meeting is to provide interested vendors with an opportunity to obtain clarification, from subject matter experts, regarding the specifications and requirements outlined in this RFP.

The Pre-Proposal Virtual Meeting date is listed in Section 1.6.1; **this meeting is NOT mandatory.** The meeting will be held via Microsoft Teams. Instructions for attendance of the Pre-Proposal Virtual Meeting can be obtained by sending an email to the RFP Coordinator at the address in Section 1.6.2.

It is preferred that all questions, comments and requests be received via e-mail no later than one (1) business day prior to the virtual meeting. This will allow the RFP Coordinator time to review the questions and prepare responsive information prior to the pre-proposal virtual meeting. Vendors may also ask questions, make comments, or request information during the pre-proposal virtual meeting. Verbal questions may be discussed at the pre-proposal virtual meeting. However, all answers provided verbally will not be considered binding. The only official answers will be posted in writing in the form of an RFP Addendum on or before the date listed in Section 1.6.1.

Vendors are encouraged to submit questions or comments or make requests for information or clarifications until the Final Written Questions Due date identified in Section 1.6.1. All questions must be submitted via email to the address in Section 1.6.2. No additional questions will be responded to after the Written Questions Due date listed in Section 1.6.1.

1.6.4 Proposal Submittal

Physical Mail Submittal Option

Vendors may deliver a hard copy of one (1) original signed copy and two (2) bound copies to the address shown below. Submissions must be signed by the person authorized by your company to commit your company to all instructions, conditions and pricing as defined, or entered in or on, the proposed documents. The proposals containing original signatures must be clearly marked "**ORIGINAL**". In addition, if submitting hard copies, Vendors must deliver one (1) electronic copy (i.e., flash drive) of the Proposal Response Forms and Functional Requirements Response Forms (spreadsheets) in their native Word and Excel formats on or before the Proposal Submission Deadline identified in Section 1.6.1. Electronic images or .pdf versions of these files will not be accepted as compliant.

All hard copy proposals and RFP bond submittals must be delivered to the address shown below on or before the Proposal Submission Deadline identified in Section 1.6.1. Submit documents in a sealed envelope with the following information marked plainly on the front:

Address	City of Keller Attn: Ryan Lee 1100 Bear Creek Parkway Keller, TX 76248
Date:	August 18, 2022, 3:00 PM CST
Title:	ATTN: RYAN LEE COMMUNITY DEVELOPMENT SYSTEM PROPOSAL
RFP #:	22-022

<u>Electronic Submittal Option</u>

If Vendors do not wish to submit hard copies, they must submit all referenced proposal documents in their native formats electronically through the City of Keller's eBid system at www.cityofkeller.com/services/finance/bidding-information. If submitting proposal documents through the eBID system, Vendors shall be required to submit the required RFP Bond (See attachment A3, 55. Bonds) either through mail or in-person to the address shown above on or prior to the Proposal Submission Deadline indicated in section 1.6.1.

Proposals submitted via email or facsimile will not be accepted. Proposals submitted in a non-compliant format may be considered "non-responsive" and can be rejected. For supplemental information, place that information at the end of the section marked: "Contractor Supplemental Information".

In addition, Vendors must conform to the following:

- Vendors must follow the format outlined in Section 1.5 and fill out completely the form(s) furnished in:
  - A1 - Proposal Response Forms; and
  - A2 - Functional Requirements Response Forms.

- Any costs associated with preparing proposals in response to this RFP are the sole responsibility of the Vendor.
- All proposals and supporting materials as well as correspondence relating to the RFP become the property of the City when received.
  - Any proprietary information contained in the proposal should be so indicated.
- The Vendor is responsible for assuring proposal delivery on or before the stated date and local time as well as for any associated delivery costs. The City is not responsible for lateness for any reason (e.g., mail, carrier). Proposals submitted after that date will not be considered.
- The City reserves the right to refuse all proposals in their entirety, or select certain components and/or services from various proposals.
- Any exceptions to the specifications must be stated on the Proposal Response Forms.
- Additional instructions, general terms and conditions are provided in the Attachment A3 - City's Standard Terms and Conditions.
- The City of Keller reserves its right to reject any or all proposals at any time, with or without cause.

1.7   Definitive List of Proposal Contents

The City of Keller requires a uniform proposal format so that all proposals can be fairly evaluated.

1.7.1   Response Format

Vendors are advised that the City's ability to evaluate proposals is dependent on the Vendor's ability and willingness to submit proposals which are well-ordered, detailed, comprehensive, and readable. Clarity of language and adequate, accessible documentation is essential.

Vendors must follow the response format outlined in the table below. In addition, response forms have been provided and must be used to allow each Vendor to provide a uniform response. The forms include:

- **Proposal Response Forms**. The Vendor is required to use the Proposal Response Forms contained in this volume for their proposal response. This volume contains response information from the Vendor related to qualifications and references, functional requirements, hardware and network requirements, contractual requirements and price proposal. All proposal responses must be entered into the electronic form (MS Word) provided as part of the Vendors proposal response. Electronic images or .pdf versions of these files will not be accepted as compliant.

- **Functional Requirements Response Forms.** The Vendor is required to use the Functional Requirements Response Forms contained in this volume for their proposal response. This volume contains detailed descriptions of all technical and functional specifications and requirements for the proposed system, **including integration and configuration requirements**. This form can be found in Attachment A2 – Functional Requirements Response Forms.

Optional requirements will not be scored for the purposes of evaluating a vendor's capabilities during the proposal evaluation phase of the selection process. However, should vendors score similarly, the City may use provision of optional requirements to differentiate between vendors.

Given that these are optional functionality the City does not deem as critical, if the pricing of these requirements has additional costs associated with them, they should be priced separately, clearly defined in the A1 – Proposal Response Forms, Section 8 – Price Proposal.

All Technical proposal responses must be entered into the electronic form (MS Excel) provided as part of the Vendors proposal response. Electronic images or .pdf versions of these files will not be accepted as compliant.

Item	Instructions
Cover Letter	Submit a copy of the cover letter on your letterhead signed by the responsible official in your organization, certifying the accuracy of all information in your proposal, and certifying that your proposal will remain valid for a period of two hundred seventy (270) calendar days from the date of proposal opening.
Use the Proposal Response Forms to respond to the following sections:	
Section 1.0: Qualifications and References Response	Use the attached MS Word file titled, **"A1 - Proposal Response Forms,"** to respond to this section.

Item	Instructions
Section 2.0: Functional Requirements Response	The requirements for all of the software systems covered by this procurement are described in the MS Word file titled **"A1 - Proposal Response Forms".** Respond directly into MS Word File. Respond to the functional requirements by entering directly into the MS Excel spreadsheet under **"A2 - Functional Requirements Response Forms"**.
Section 3.0: Infrastructure Requirements Response	Respond to RFP Section 3. Use the attached MS Word file titled **"A1 - Proposal Response Forms"** to respond to this section. Where the RFP asks for lists or detailed supplemental information, place that information in the Vendor Supplemental Information at the end of the section. Include a schematic of the system.
Section 4.0: Service and Maintenance Requirements Response	Respond to RFP Section 4. Use the attached MS Word file titled **"A1 - Proposal Response Forms"** to respond to this section. Where the RFP asks for lists or detailed supplemental information, place that information in the Vendor Supplemental Information at the end of the section.
Section 5.0: Performance Requirements Response	Respond to RFP Section 5. Use the attached MS Word file titled **"A1 - Proposal Response Forms"** to respond to this section. Where the RFP asks for lists or detailed supplemental information, place that information in the Vendor Supplemental Information at the end of the section.
Section 6.0: Implementation Requirements Response	Respond to RFP Section 6. Use the attached MS Word file titled **"A1 - Proposal Response Forms"** to respond to this section. Place the following information in the Vendor Supplemental Information: ▪ Proposed Implementation Schedule; ▪ Project organization chart; and ▪ Resumes for the persons who will work on this project.
Section 7.0: Contractual Requirements & Forms	Review Attachment A3 – City's Standard Terms and Conditions in this section. Note any exceptions in Section 7 of the **"A1 - Proposal Response Forms".**
Section 8: Price Proposal	Follow the instructions in RFP Section 8 for preparing cost summary, explanatory notes, and back-up details. Use the attached MS Word file titled **"A1 - Proposal Response Forms"** to respond to this section.
Attachments:	Appendix 1 – Brochures / specification / contracts for proposed products as necessary (if any)

1.8 Evaluation & Award Process

The City will conform to the evaluation and award process below, subject to change at the agency's discretion.

- Proposals will be objectively evaluated by a committee based on conformity to the specifications as determined by the evaluation criteria in RFP Section 1.9, and a short list will be developed;
- Short-listed vendors may then be evaluated based on references, oral presentations, demonstrations and site visits to similar installations. Written responses to queries for further clarification may also be required;
- Final scoring will be based on the criteria given in Section 1.10;
- Best and Final offers may be requested from the short-listed vendors; and
- Contract negotiations will begin immediately with the selected Vendor.

1.9 Initial Evaluation Criteria

The City will evaluate Vendors' proposals based on the completeness and quality of their responses to all sections.

Section	Description	Value
1.0	Qualifications & Experience	15
2.0	Functional Requirements Proposal	20
3.0	Infrastructure Proposal	10
4.0	Service & Maintenance Proposal	15
5.0	Performance Proposal	10
6.0	Implementation Proposal	15
7.0	Contractual Proposal	5
8.0	Price Proposal	10
	TOTAL PROPOSAL EVALUATION	**100**

1.10 Final Evaluation

Once a short list of vendors has been invited to continue with the process, other Vendors will be notified. The short list of vendors will be engaged to demonstrate their products; based on their performance in the demonstration, references and, if the City desires, site evaluations, up to two vendors will be asked to participate in a best and final process.

Element	Value
Initial Evaluation Criteria (Table Above)	100
Demonstration	40
References / Site Evaluation	10
OVERALL EVALUATION	**150**

2.0 BACKGROUND AND FUNCTIONAL REQUIREMENTS

2.1 Introduction

This section provides agency operational background and detailed description of the systems being replaced by those systems outlined in Section 1.1 above.

2.2 Current Applications Environment

2.2.1 Application Systems Overview

The City acquired the TRAKiT permitting system several years ago. There are also other peripheral applications required for the daily workflow of the Department. Since the time of adoption, TRAKiT has enhanced the system's capabilities through the implementation of eTRAKiT which provides for more modern functionality, such as online payments. However, the system still does not meet the City's needs, especially in the areas of integrating information, electronic forms processing, automated workflow, reporting and financial tracking.

Current Applications Interaction Diagram
Community Development
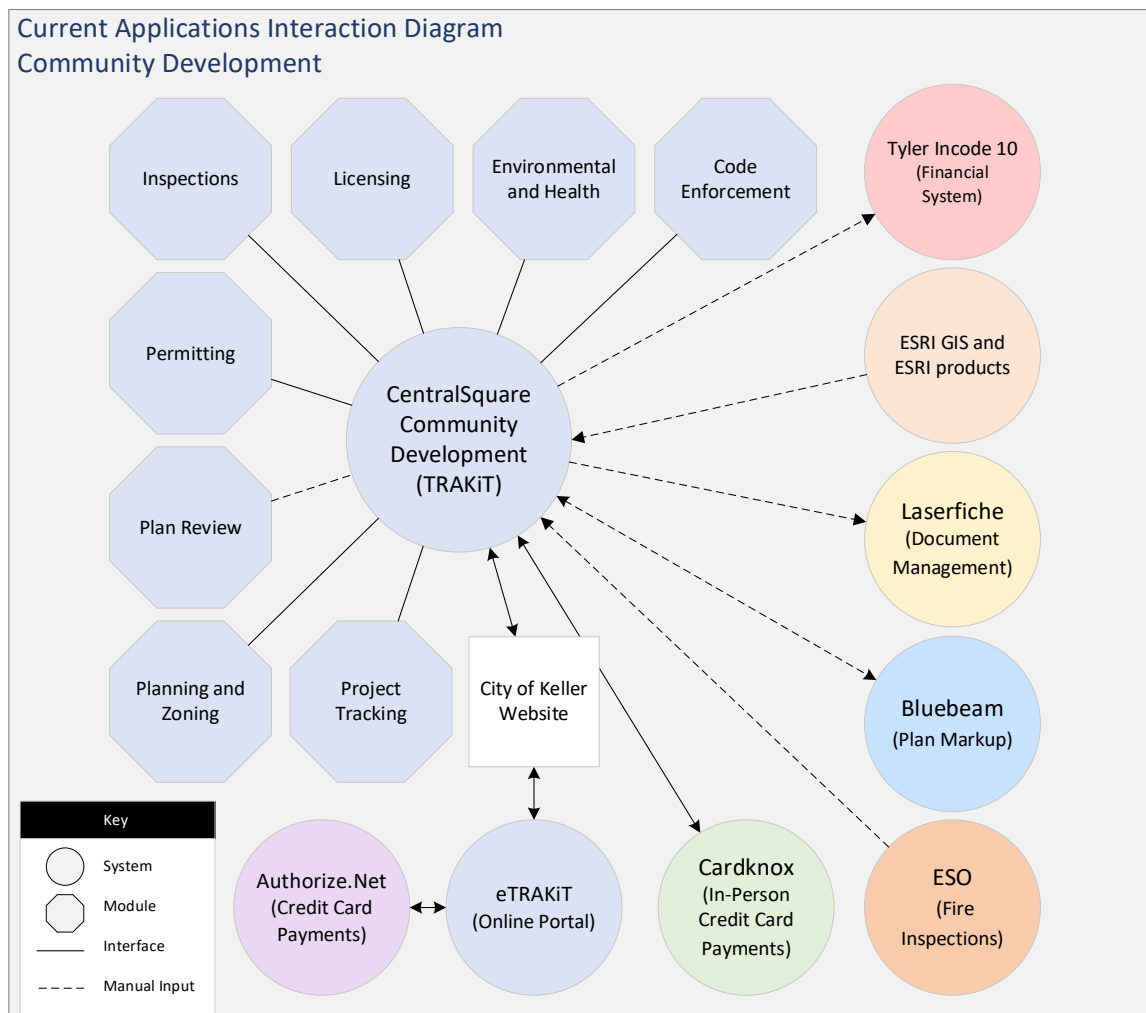
2.2.2 Current Department Workflow

The City's official document repository is LaserFiche. However, functionally the main repository for working documents and forms is either inside TRAKiT or on each staff member's individual network drives. Since TRAKiT is not an adequate workflow engine for the City's needs, share drives are utilized to store and share documents as part of the business process. Email out to other staff members is utilized as the primary method of communication within the department. These linkages shown in the diagram are manual inputs or uploads from City staff, which greatly limits efficiency. Once the permit or plan is complete, the final documents are stored into Laserfiche for archival and inter-departmental use. There is not much logic currently programed within the system that can be utilized, with the exception of the initial application/payment process. With workarounds, this process has been made to work in the past, the growing needs and demands from the City will make these manual workflows more time-consuming and limit efficiency for staff members.

Permitting and inspections also have a manual process for their workflows. In the field with the third-party inspection company, inspectors use carbon copy paper to perform inspections and take notes. These results and notes are later manually input by City staff into TRAKiT. Once entered into the system, these results are viewable in the online TRAKiT portal (eTRAKiT) where the contractor can login. For Code Enforcement, residents can report an issue via the ESRI Citizen Problem Reporter app, but code staff initiates all recorded code actions from the office.

In addition, there is no integration between TRAKiT and the finance system, Incode 10, in order to upload the financial transactions for the department. A linkage in the new system will be necessary to automate this workflow for more accurate financial reporting.

2.2.3 Workflow Configuration Requirements

It will be required for the Vendor to fully configure all identified workflows in this RFP into the new system. Refer to section 6.6.1 for business process and workflow configuration requirements for implementation of the system.

2.2.4 Interfaces and Migration Plan

The City uses the following ancillary systems to interface with the current TRAKiT system. The chart below describes the interface as well as shows the preliminary migration plan to the new community development system. These interfaces are also summarized in the "A2 - Functional Requirements Response Forms" spreadsheet for the proposer to answer whether they can or cannot interface with the application and input the cost of each application to develop the interface with the proposed system.

Table 2.1 Current Systems and Interfaces

*Legend for Current Applications	
Migration Code	Description
Replace	The City is intending on replacing this application with the selected solution.
Interface	The City is intending on keeping the application and interfacing/integrating it with the selected solution.

Current Application / Interface	Application Description	Preliminary Migration Plan
TRAKiT (CentralSquare)	Main Permitting/Inspection System	Replace
Esri GIS	City GIS System	Interface
Tyler Incode 10	City Financial System	Interface
Laserfiche	Document Management	Interface
ESO	Fire Inspections	Interface
Bluebeam	Plan Markup	Interface
Cardknox	In-person Credit Card Payments	Replace with Global Payments/Open Edge
Authorize.net	Online Credit Card Payments	Replace with Global Payments/Open Edge
Global Payments/Open Edge	Future City-wide In-person & Online Payment Processor	Interface
MS Word and Excel	Notes and Contacts Management	Replace

These applications, although critical to the overall functionality of the Community Development Department, are not integrated into a logical workflow. Further analysis of these functional processes show that the lack of integration forces the users to operate in a reduced state of efficiency, primarily due to the extensive paper tracking, manual workflows, and re-entry of information.

2.3   Current Infrastructure and Technical Environment

As part of the City's Assessment, the following technical areas were examined to identify any challenges that could inhibit the new system's effective installation, deployment and use. The proposed system needs to comply with these standards and integrate with the hardware already used by the City.

Table 2.2 Technical Environment

Technology Standard	Current
Operating Systems (OS) & Related Software	
▪ Server operating system(s) and version levels	Windows Server 2019
▪ Desktop operating system(s)	Windows 10
▪ Mobile device operating system(s)	iOS
▪ Relational database	Microsoft SQL Server
▪ Geographic information system (GIS)	Esri GIS
▪ Business application environment	Microsoft Office
▪ Document management system	Laserfiche
Hardware	
▪ Server hardware	Dell
▪ Desktop hardware	Dell
▪ Mobile hardware	Apple (iPhones & iPads)
Data Center	
▪ Existing server space	Sufficient space for new system
▪ Rack space	Sufficient space for new system

Technology Standard	Current
▪ Environmentals (e.g. AC power)	Sufficient space for new system
▪ Backup solution	Automated daily via Veeam server
▪ Disaster recovery site	Onsite backup data center, but is interested in exploring DRaaS
Network	
▪ Underlying WAN infrastructure	Gigabit Ethernet
▪ Network equipment (e.g., switches, routers)	Cisco
▪ Internet Points of Presence (PoPs)	2 PoPs, both at Keller Town Hall, 1100 Bear Creek Pkwy, Keller TX 76248
Other	
▪ Field Automation Capabilities	The City is open to deploying field automation devices where an improvement in efficiency and effectiveness will result.
▪ Website Integration	This functionality is critical for the proposed system with a self-service Customer Portal.
▪ Customizations	The City wants to purchase a system that is self-configurable, commercial off-the-shelf (COTS) system. It is not interested in customizations or systems that require teams of software engineers to configure the system.

2.4 Migration from the Current System

The City currently uses the TRAKiT permitting system. The new system must be able to utilize accumulated data from the systems currently in place. The migration path from the existing systems must include any necessary modifications to currently existing systems which are not being supplanted by the new system as well as any necessary data conversion and importation from current systems.

Proposals should include full data conversion for all TRAKiT data. Specifics about present systems can be provided upon request. Answer the questions related to data conversion and how your company handles this in the Proposal Response Forms, Attachment A1. Sizing parameters for the current system's data are provided below.

Table 2.3 Sizing Parameters

Operating Volumes/Standards	Current
City Statistics	
City of Keller Total Population	45400
Jurisdictional Area (Square Miles)	18.4
Residential Units	16094
Number of Departments	15
Budget (General Fund)	$45,445,179
Budget (Utilities)	W/WW-$28,165,229; Drainage-$1,719,725
Budget (IT)	$2,389,964
Budget (All Funds)	$100,247,944
Total Staff (FTE)	344

Number of Permitting System Users (Total)	~41
Number of System Users per Area	
Development Services (PL, BS, CE)	14
Public Works & Engineering	14
Fire, PD, IT, GIS	2, 2, 1, 1
Parks, UB, ED, Finance	2, 2, 2, 2
System Statistics (Last Year)	
New construction valuation	$143,672,760
Plan reviews	74
Zoning changes	10
Number of GIS Layers	91
Average number of development application reviews	300
Number of complaints for Code Enforcement violations	1020
Code Enforcement Inspections / Year	3250
Notices of Violation Issued / Year	750
Building Permits / Year	150
Building Inspections / Year	4800
Magistrate Cases / Year	15
Commission Reviewed Items / Year	125

2.5 Future Direction

2.5.1 Application Systems

The City of Keller has chosen to invest in a next generation integrated Community Development System in order to streamline the information flow within the City and improve the efficiency of its workforce. In addition, the City aims to incorporate state-of-the-art self-service capabilities for both its internal staff and citizens.

As shown in the graphic on the next page, the Community Development System will need to interface to the LaserFiche Document Management System, as this will become the main document archival system for the City. The proposed system also will need to interface to a number of peripheral systems in order to support the City's other operational department needs. A complete list of interface/dataflow requirements can be found within the A2 - Functional Requirements Response Forms.

The City of Keller is embracing digital government with a focus on improved customer service and efficient operations. In the time since acquisition of the City's current municipal system, processes and internal demands have evolved and expanded, creating functional gaps between the system's available capabilities and those being demanded by users. The City is also addressing the changing expectations of its citizens for effective customer service and interaction. As a result of the Internet, citizens expect that information can be acquired on-demand, and goods and services can be purchased whenever and wherever they are. The City is responding to these changing demands and system deficiencies in order to maintain and improve the satisfaction levels they have

long enjoyed. Effective implementation of digital government should mean lessening the stress on the traditional channels (e.g., in-person, mail phone), thus a reduction in the number of people waiting in lines or placed on hold.

In addition, the City believes that planned, prudent investment in technology that enables the citizenry to conduct transactions with minimal City staff intervention will also help to better utilize existing staffing levels to meet the demands from a growing population.

Future Applications Interaction Diagram
Community Development
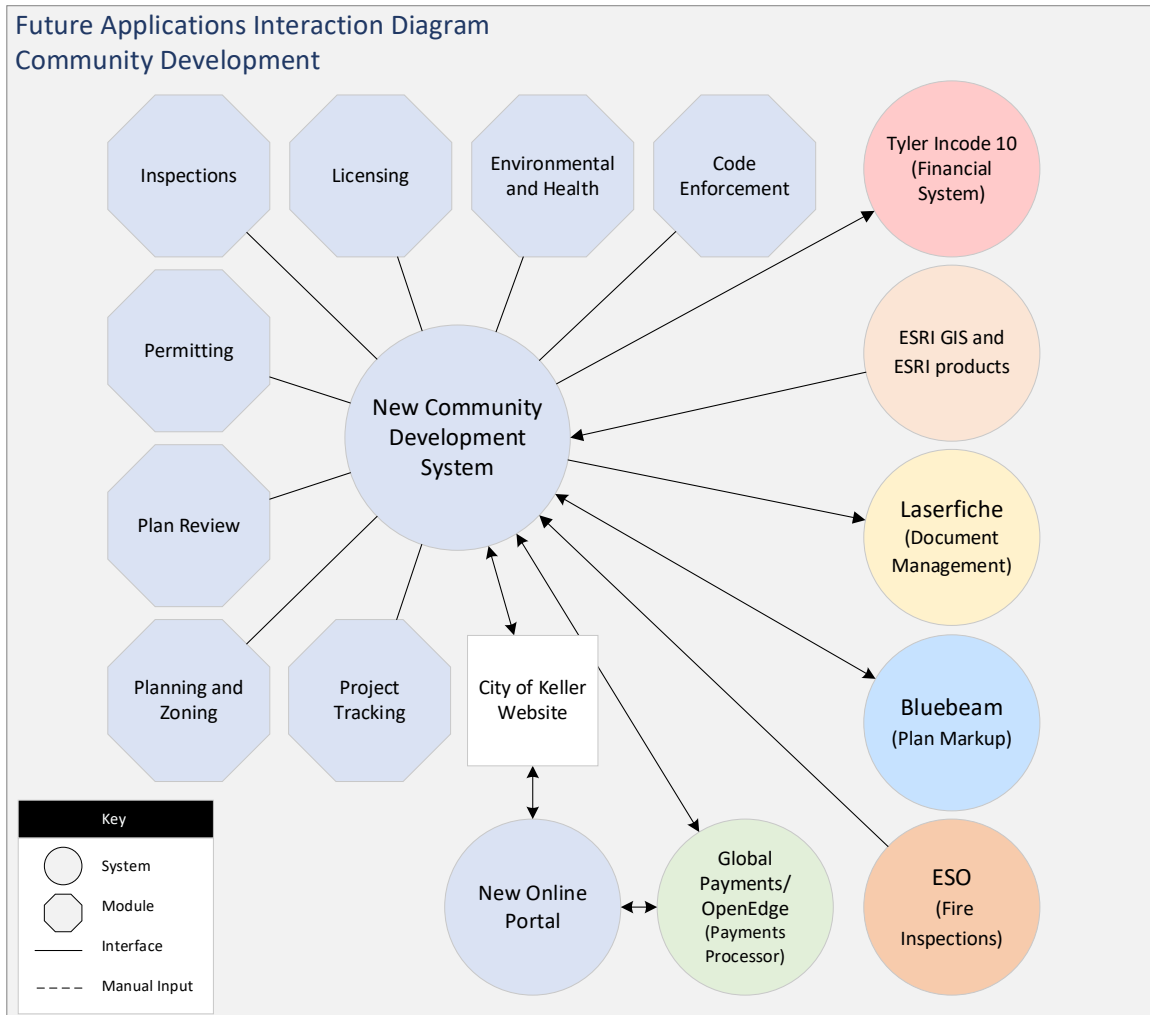
2.5.2 Infrastructure and Network

The system is currently being hosted locally by the City in the primary data center located at City Hall. The City also hosts a backup data center for disaster recovery and system failover. The two data centers feature modern infrastructure that supports the City's data and software applications. The current process for backups is utilizing a local Veeam server for long-term storage. The proposed solution will need to be able to work in this environment, if locally hosted.

The City's network currently consists of 1/10GB dedicated fiber to the main sites. Two ISPs come in at the Town Hall with Frontier and OneSource. These are recommended to

be separated out for disaster recovery purposes. The City's switches and routers are mainly Cisco with Palo Alto firewalls. It is expected that the Vendor will review the City's network and identify any network concerns it might have that would impede it from meeting the performance requirements specified in Section 5.
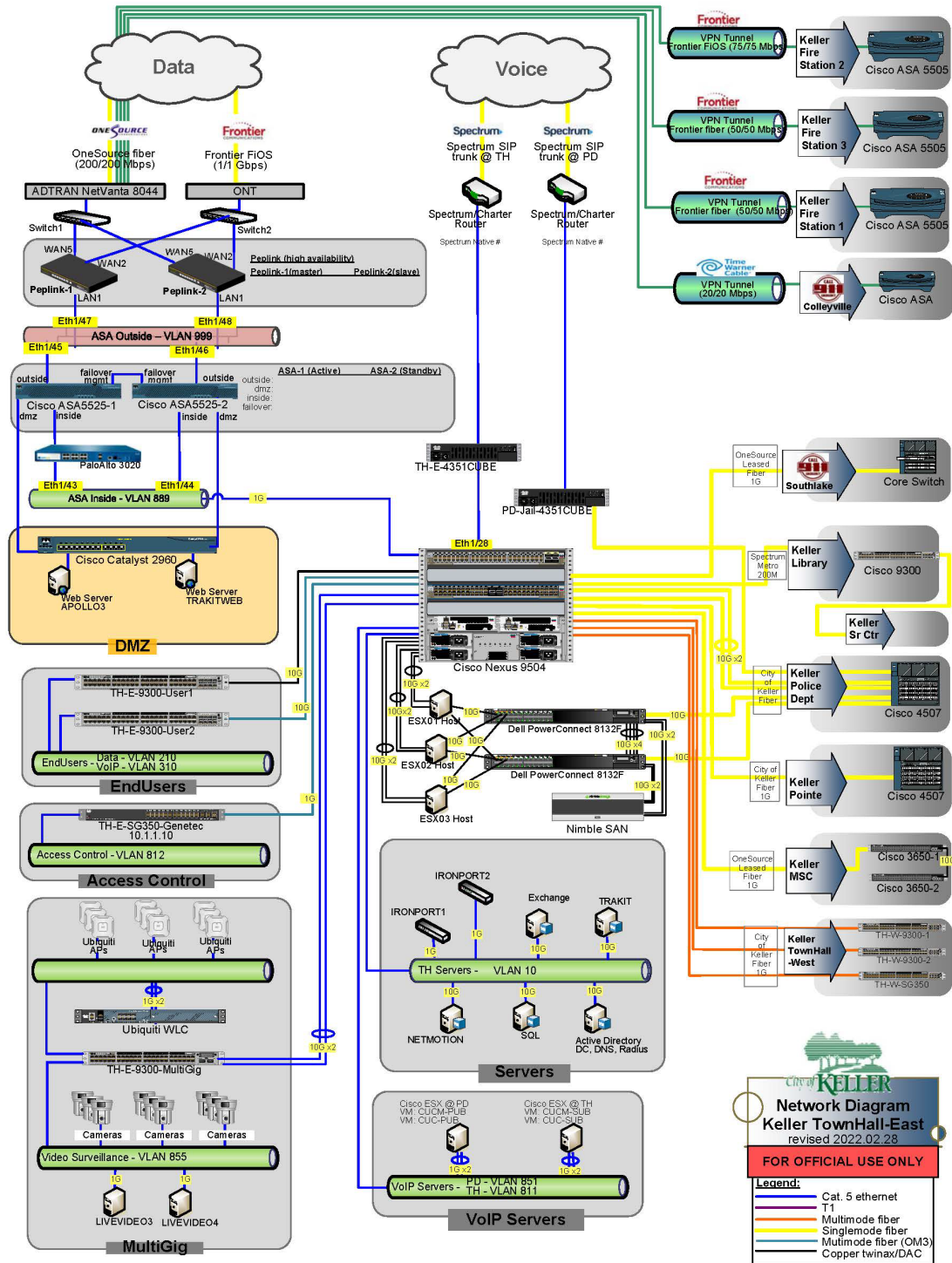
The City of Keller's mission critical applications are vital to the ongoing operation of the City. The City is willing to explore disaster recovery options, including VMWare disaster recovery or a hosted, Cloud-based backup solution from the Vendor.

The City will provide rack space for equipment provided by the Vendor to this project. The Vendor will provide specifications for its equipment as well as the servers used to support the system. If locally hosted, these systems will be installed at the City Hall data center.

2.6   Functional Requirements

The City will replace the core Community Development functionality and component systems to provide the Overall Functional Requirements identified in Section 2.6.1, below, as well as the Software Functional Requirements referred to in Section 2.6.2, below, and identified specifically in the Functional Requirements spreadsheets.

2.6.1   Overall Functional Requirements

In evaluating overall functional requirements, the City will consider the following:

- **Industry Standard Architecture** – The architecture will be flexible and will be based on widely accepted standards. This will make it easier to integrate/interface the mission critical applications and other internal and external /modules. It can also improve the systems' ability to interoperate with a number of modern technologies, such as:

  - Document and imaging management systems
  - Powerful and flexible ad hoc reporting tools
  - Web-based self-service functions for employees and citizens.

- **High Availability** – The architecture, will need full redundancy and fail-over capabilities, and should contain no single point of failure.
- **Secure** – The system will incorporate the elements of authentication, authorization, encryption, monitoring/detection, and physical security that adhere to industry standards.
- **Web-Based Architecture** – The systems will take advantage of the integrating capabilities of the web services architecture. This will provide many users the ability to interact with the applications via a Web browser.
- **Scalable** – Scalability will be critical to support expansion and workload variability.
- **Integration** – The core CDS must act as a single system, with required data flowing between modules or systems as required to act as a single system. Component systems must be integrated to the core system as described in the Specifications. The City requires that the core systems vendor and the component system vendors will work together to ensure that this integration occurs and is maintained. Costs for establishing and maintaining this integration must be provided in your quotation.
- **Workflow Functionality** –Electronic workflow enables the specification of business rules, roles, and routings that can be used to automatically route electronic documents, such as budgets or purchase acquisition requests, to supervisors and management for notification, review, and approval.

- **Relational Database Management System** – The City has standardized on SQL Server for relational database technology since it supports ready interface and integration among systems. The new system will utilize this technology and make the database accessible to the City.
- **Data Integrity and Validation Tools** - The system will facilitate the validation of the key parameters of address and personal identity. The system will validate address entries through integration with the system geo-database.
- **External Integration Flexibility** – The system will adhere to the use of industry standards. This will make it easier to integrate the mission critical systems and to share data with external systems.

2.6.2 Software Functional Requirements

The requirements for the software systems covered by this procurement are described in the attached MS Excel file:

- A2 – Functional Requirements Response Forms

For each specification, Vendors will be required to provide one of four standard responses. Respond directly into each spreadsheet; failure to do so may cause your response to be considered non-compliant.

For the purposes of response, use the following definitions of your four standard response options:

- **Compliant** - Proposed system meets or exceeds the requirement. This is the only response category that will result in full credit for complying with this requirement.
- **Alternative Method** – The requirement is met by the proposed system but uses a method (e.g., entry screen, workflow, form[s]) that differs from that specified in the requirement. Detail the method to be used to meet the requirement.
- **Modification Required** – A modification must be provided to comply with this requirement. The requirement will be provided with the initial install of the software. Specify the modification to be made and include cost, if any, in the pricing proposal.
- **Non-Compliant** - The proposed system does not meet the requirements and will not do so within twelve months of the RFP release date.

Explanations of responses should be entered into the "Comments" field if you can reasonably do so; if not, include the explanation in the "**Proposal Response Forms,**" Section 2. Submit any additional information in the attached "**Proposal Response Forms**." Include all these documents as part of your proposal submission.

3.0 INFRASTRUCTURE REQUIREMENTS

3.1 Introduction

This section describes the servers, peripherals, data communications equipment, hosting environments, performance and reliability requirements, and workstations required for operation of the proposed system(s) to support the application software requirements, volumes, and processing characteristics defined previously.

Use Section 3 to develop an understanding of the existing and future environment. Respond to each of the points as described in the section by using the attached response forms. Vendor-Hosted and On-Premise solutions should respond to their respective sections as labelled, and Vendors able to provide either option should respond to both sections. For each of the sections and subsections state in the **Proposal Response Forms** whether you meet the requirements with explanation of your compliance or non-compliance.

3.2 System Architecture

Provide an introductory narrative of how the proposed system meets the overall objectives and functional requirements. It should cover the main features and benefits that distinguish your system.

Vendors may bid with either or both of the following system integration options:

A. **On-Premise** - The City purchases software and implementation services from the Vendor, but elects to implement on the City's infrastructure; or
B. **Vendor-Hosted SaaS** – The City purchases the Vendor's SaaS services.

Sections corresponding to each proposal type are labelled in accordance to this (On-Premise solutions must respond to all sections with numbering that includes **A**, while Vendor-Hosted SaaS solutions should respond to all sections with numbering including **B**). Vendors capable of providing either solution should respond to both.

For both On-Premise and Vendor-Hosted solutions, subsequent to the introductory paragraph, expand upon your plan for future system enhancements; your investment plans are considered to be a reflection of your company's commitment to the long-term viability of the system architecture. The installed system must be capable of expansion in a modular and incremental fashion.

3.2A   On-Premise

If proposing an On-Premise solution, your response should include a **System Diagram** that depicts the overall design of the system.

3.2B   Vendor-Hosted SaaS

If proposing a Vendor-Hosted solution, your response should include a **Multi-Data Center Topology Diagram** depicting the Vendor's primary and backup data center locations and

the method by which the connection is routed to the primary data center as well as to how the connection is rerouted to the City in the event of a Catastrophic Service Interruption.

3.3 Infrastructure Specifications or Hosting Environment

The intent is to pursue one of two paths and desires proposals for both if available:

A. Purchase software and services from the Vendor to install on the City's servers (On-Premise), elaborated in Section 3.3A below.

B. Purchase the Vendor's Software-as-a-Service (SaaS), elaborated in 3.3B below.

Vendors should utilize the response forms sections for either 3.3A for On-Premise proposals, 3.3B for Vendor-Hosted SaaS proposals, or both if each option is available.

3.3A Infrastructure Specifications [For On-Premise Proposals]

3.3A.1 Server Specifications

The Vendor is to specify the required servers that support the application performance. The Vendor should specify the application servers that they recommend that could be used in a virtual environment.

3.3A.2 Operating System and Related Software

The City has standardized on Microsoft Windows. The future solution must be capable of supporting real-time applications that are actively supported by the CPU hardware manufacturer. Licenses for the operating systems will be received. All proposals must provide the name and version number of the proposed operating system. Proposals that incorporate a non-Microsoft operating system solution must contain an explanation for the choice of operating systems and must indicate whether it is the Vendors intention to migrate to a Windows environment in the future.

3.3A.3 Disaster Recovery Solution

3.3A.3.1 Identify your business continuity and disaster recovery options, with their respective costs.

3.3A.3.2 Identify how and where the disaster recovery data may be stored.

3.3A.3.3 Describe the replication and synchronization strategy for restoring the complete system (both data and application software) within the Vendor's operating environment (i.e., intra and inter data center replication).

3.3A.3.4 Will the Vendor offer a local data replication and synchronization strategy for restoring the complete system (both data and application software) within the City's operating environment (i.e., data center replication with the City)?

3.3A.3.5 Identify the disaster recovery timeline.

3.3A.3.6 Identify whether the synchronization of backup data is real-time.

3.3A.3.7 Describe the System Restoration Plan (including any cost associated) that allows the City to continue to operate the complete system (including application software) in the event of a system failure.

3.3A.4 Upgrades and Expansion

The hardware specifications for the proposed locally-hosted system provided by the vendor must, at initial installation, using data volumes and processing characteristics described in this RFP, operate at no more than thirty-five percent (35%) of capacity (for CPU, memory, and I/O performance). The proposed server specifications must support 5 years of transactions based upon five percent (5%) per year increase to present transaction volumes.

3.3A.5 Concurrent Operation

If the system's submodules share the same database, general queries that span a large number of tables might place undue stress on the database server. In addition, a request that locks a large number of rows on a frequently used table could cause contention issues. These types of situations could affect other requests, overall system throughput, and response times. All application systems must be able to operate concurrently.

Explain the safeguards and design patterns that have been used in the application in order to ensure that a single request could not consume a disproportionate level of server-side resources. The City will expect the Vendor to meet the acceptance requirements specified in Section 5.

If the Vendor cannot meet these requirements, an explanation must be provided that addresses how the performance will not be degraded due to a single service request or transaction.

3.3A.6 Network Operating System and Protocol

A description of the City's network is covered in Section 2. The Vendor must provide a system compatible with the City's network.

3.3B Hosting Environment [For SaaS Proposals]

Beyond their functional capabilities for Vendor-Hosted SaaS solutions, evaluations of the Vendors proposed hosted environment will take place. The following specifications apply to the Vendors SaaS service infrastructure and their ability to meet the needs of the organization.

3.3B.1 Hosting Provider and Infrastructure

3.3B.1.1 Identify the SaaS service hosting provider and data center locations.

3.3B.1.2 Identify the infrastructure (hardware, software, operating system, technology platform) used in hosting services.

3.3B.1.3 Identify the primary location where the City's data would be stored.

3.3B.1.4 If the Vendors' hosting provider utilizes virtualization software, identify the virtualization software (i.e., VM Ware).

3.3B.1.5 Identify the network bandwidth that can be provided by the Vendor and identify options for dedicated bandwidth.

3.3B.2 Data Security

3.3B.2.1 Identify the Hosting Environment as either dedicated (The City's solution and data will be managed in a system independently – single tenant) or shared (the City's solution and data will be managed in a shared system – multi tenant) environment.

3.3B.2.2 If the Vendor operates in a multi-tenant Hosting Environment, identify how the City's data is separated from other solutions.

3.3B.2.3 If the Vendor operates in a multi-tenant Hosting Environment, identify what controls are in place to manage the security of the group's data.

3.3B.2.4 The Vendor shall have administrative, physical, and technical safeguards in place to make the hosting environment HIPAA compliant.

3.3B.2.5 Provide the data ownership policy.

3.3B.2.6 Once the service is initiated, the Vendor will identify if the data can be encrypted, what encryption schemes are used, Vendor decryption plan, and encryption testing plan.

3.3B.2.7 The Vendor will perform comprehensive, independent third-party audits as part of their data privacy and information security program and provide such audit findings to the City when service is initiated.

3.3B.2.8 The Vendor will provide a web-portal or separate application that allows management to view the following service audit criteria:
- Load Performance – ability to see service utilization and performance during select times.
- User Statistics – ability to view specific user's utilization of services including times utilized and application utilization
- Problem Records – ability to view active, including status, and resolved problems reported to the vendor

3.3B.2.9 Describe the Data Extraction Plan (including format and any cost associated) for the return of all City data and the expungement of data from the Vendor's systems, in the event of service termination.

3.3B.3 Disaster Recovery Management

3.3B.3.1 Identify your business continuity and disaster recovery options, with their respective costs.

3.3B.3.2 Identify how and where the disaster recovery data is stored.

3.3B.3.3 Describe the replication and synchronization strategy for restoring the complete system (both data and application software) within the Vendors operating environment (i.e., data center replication).

3.3B.3.5 Identify the disaster recovery timeline.

3.3B.3.6 Identify whether the synchronization of backup data is real-time.

3.3B.3.7 If the primary hosting environment is down, the Vendor will enable an active environment which is capable of sustaining City operations until primary hosting environment is functional and secure.

3.3B.4 Identity Management

3.3B.4.1 Describe the identity management solution, including access levels and their respective user rights.

3.3B.4.2 Describe the solution's ability to support Single Sign-On (SSO) and other authorization capabilities (i.e., SAML, HTTP-Fed, Open Auth.) within the identity management solution.

3.3B.4.3 Describe the solution's ability to integrate with the existing identity management solutions (i.e., Active Directory) utilized by the member agencies.

3.3B.4.4 Identify what other user security, authentication, and authorization options are available.

3.3B.5 Standards, Policies, and Regulatory Compliance

3.3B.5.1 Describe Vendor technology standards, policies, and procedures.

3.3B.5.2 Does the Vendor utilize certified PMP project managers for the implementation of their systems?

3.3B.5.3 Provide audit reports of the City's solution usage and records on a regular basis.

3.4   Integration Services

3.4.1 System Integration

Vendors shall identify the hardware specifications, software, databases, licensing, and connectivity required to support the Statement of Work, end-users, and administrators for the following environments:

- Production
- Training
- Test
- Development

3.4.1A On-Premise Solution Services

The Vendor is to provide design services as follows:

- Recommended specifications or requirements for:
  - o Server configurations
  - o Storage – Specify requirements for expansion of the City's existing Enterprise Storage based on projected system storage requirements over the next 5 years. The City will acquire any additional storage required.
  - o Disaster Recovery Solution – Engineer and design the system's disaster recovery option utilizing either on-site VM and/or a Cloud-based solution.
- Recommendations for any Wide Area Network (WAN) and reconfiguration enhancements to be implemented;
- Work with the IT Department to effect the necessary changes to the member agencies Active Directory to integrate the Vendor provided systems;
- Configuration of all application software at all servers. Deployment includes development and integration of interfaces to key external databases;
- Perform needed file conversion activities (as previously defined);
- Describe what types of APIs and web-services, if any, are available to utilize in pushing data to and from the solution, descriptions of API security and encryption, and limitations the hosting environment places on access to APIs;
- Detailed training of IT administrative personnel and network administrators in the use and operation of the server hardware management systems and tools;
- Detailed training for application software as specified in Section 6.8.

3.4.1B Vendor-Hosted SaaS Solution Services

The Vendor is to provide design services as follows:

- Describe what types of APIs and web-services are available to utilize in pushing data to and from the solution, descriptions of API security and encryption, and limitations the hosting environment places on access to APIs;
- Describe the customization capabilities of the system components within the hosting environment, including: URL naming options, system layout (i.e., header, footer, and login page), workflow, data fields, and customer triggers or organization logic (i.e., incident reports automatically routing to supervisors for review);
- Describe how the system will operate, or not operate, should internet connectivity be lost;
- Recommendations for any WAN network enhancements required to maintain SaaS response time performance;
- Work with the IT Department to effect the necessary changes to the member agencies Active Directory for integration with other systems;

- Configuration of application software including development and integration of interfaces to key external databases;
- Perform needed file conversion activities (as previously defined);
- Detailed training of IT administrative personnel and network administrators in the use and operation of the server hardware management systems and tools;
- Detailed training for application software as specified in Section 6.8.

3.5   Reliability Requirements

The following specification describes the uptime requirements for Vendor's Services following the City's formal acceptance of the Services and throughout the life of the contract between the City and the Vendor.

3.5.1   Processes and remedies in place that support that the system will be available to authorized users for normal use 99.9% of the Scheduled Uptime.

3.6   Performance Requirements

The following specification describes the performance requirements for Vendor's services following the City's formal acceptance of the Services and throughout the life of the contract between the City and the Vendor.

3.6.1   Processes and remedies in place that the system transactions have a response time of 5 seconds or less for the full duration of the Scheduled Uptime.

3.7   End User Equipment

3.7.1   Desktop Workstations

The City utilizes Microsoft Windows 10 on its workstations. Vendor must verify that their products will operate on Windows 10 operating systems and provide an explanation of their roadmap if there are any plans to support HTML5.

3.7.2   Scanners

Provide specifications for scanners that are compatible with your system and capable of simultaneously scanning documents and reading bar codes including:

- 8 ½ x 11-inch single workstation scanners
- 8 ½ x 11-inch high speed batch scanners
- Large form factor (minimum 36 x 48 inch) scanners.

3.7.3   Field Automation Equipment

The City will provide any tools required for field automation. The Vendor will specify recommended hardware and operating system required to run any of their field application(s).

4.0 SERVICE AND MAINTENANCE REQUIREMENTS

4.1 Vendor Instructions

This RFP Section contains general and specific requirements related to the provision of system maintenance and repair and other services throughout the life of the contract between the City and the Vendor. Services described are both warranty and non-warranty services for any equipment and software whose warranty or maintenance is provided by the Vendor.

4.2 General Maintenance Provisions

The following requirements are applicable to maintenance and repair services supplied by the Vendor or Vendor's sub-vendors. Respond to sections corresponding to the proposed solution type (On-Premise and/or Vendor-Hosted SaaS).

4.2A On-Premise Maintenance Provisions

4.2A.1   The proposed system must include a minimum first year maintenance after acceptance, assure availability and fixed price for 5 years of support and maintenance.

4.2A.2   The City may purchase one or more additional years of support and maintenance, and other specified ongoing services, on a year-by-year basis, or purchase a five-year support agreement.

4.2A.3   The production environment must be designed for 24-hour per day and 7-day per week (24x7) high availability with load tolerance and real-time failover. Maintenance must not disrupt service.

4.2B Vendor-Hosted SaaS Maintenance Provisions

4.2B.1   Assure availability for support and maintenance of application software and hosting services.

4.2B.2   The City may purchase one or more additional years of support and maintenance, and other specified ongoing services, on a year-by-year basis.

4.2B.3   The production environment must be designed for 24-hour per day and 7-day per week (24x7) high availability with load tolerance and real-time failover. Maintenance must not disrupt service.

4.2B.4   The City expects the Vendor to provide a sample Service Level Agreement (SLA) of similar scope to the City.

4.2B.4.1 Provide standard policy for remedies associated with Service Level Agreement violations (i.e., uptime and response time).

4.2B.4.2 Verify that you comply with industry standards ISO 27001, SOC 2 (auditing) and GPDR (data protection and privacy).

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4.3   Updates & Enhancements

The following requirements are applicable to all maintenance and repair services supplied by the Vendor.

4.3.1   Operating and Database Software updates for enhancements, and refinements to purchased capabilities will be provided by the Vendor as part of the maintenance.

4.3.2   Vendor will allow for the submission for any system modifications required by the City after system cutover. The Vendor shall provide feedback to the City in the form of a price proposal, or the planned development cycle for the change request.

4.3.3   The vendor is to provide the City with their stated update strategy, timeline (i.e., updates annually, bi-annually, etc.), and their requirements for the City to accept such updates.

4.3.4   The City will not be required to upgrade the overall system more than twice per year.

4.3.5   Vendor will provide software and other materials and expenses necessary to maintain the application software system in good operating condition as part of the price for maintenance, for those years in which maintenance is purchased from the Vendor, in conformance with the application specifications and performance requirements stated in this RFP. The Vendor will notify the City prior to making updates or changes to the system.

4.4   System Maintenance

The following requirements are applicable to all maintenance and repair services supplied by Vendor.

4.4.1   The entire system solution as proposed in this RFP must include all first-year maintenance costs (for Vendor-supplied software) to conform with contractually agreed specifications, and to protect against any defects or damage, caused by Manufacturer, Vendor, or Vendor's sub-Vendors, in the system's software, as well as offering a 5-year support agreement.

> a). 7 x 24 Maintenance to be provided as part of year one maintenance.

4.4.2   The year one maintenance will begin (for products accepted in phases) at the point that the System is officially accepted by the City, as defined in RFP Section 5.3, System Acceptance.

4.4.3   All software resolutions made under maintenance will be at the sole expense of the Vendor including labor, travel expenses, meals, lodging and any other costs associated with resolution.

4.5   Support Requirements

The following specification describes the support requirements for Vendor's Services following the City's formal acceptance of the Services and throughout the life of the contract between the City and the Vendor.

4.5.1 Provide telephone and email support ("Technical Support") 24 hours per day, 7 days per week, and 365 days per year. Support will include any research and resolution activity performed by Vendor.

4.5.2 Client will access support by calling or emailing the Vendor's Technical Support staff or by submitting a request via the Vendor's customer service web portal.

4.5.2.1 Incident Resolution Process

The City needs to understand the typical process that will be followed by the Vendor in order to troubleshoot a user support call. Provide the location of your primary support center, trouble ticket system used, incident analysis tools used (i.e., SolarWinds, OpenView) and what support groups (i.e., application software, database, infrastructure) are involved in the resolution of a support call.

a) Do the support specialists have direct physical access to the programmers and database managers for incident troubleshooting?

b) For Vendor-Hosted solutions, do the support specialists have direct physical access to the hosting infrastructure engineers and systems software administrators for incident troubleshooting?

c) Are the support specialists, programmers, database administrators, systems software administrators and infrastructure engineers all staffed by Vendor employees? If not, what sub-vendors are responsible with each of these areas?

d) If multiple sub-vendors are involved does the Vendor have defined SLA's with them?

4.5.3 The Vendor will adhere to the following Problem Severity Levels:

- Problem Severity 1

  o Description: This Problem Severity Level is associated with: (a) The services or system, as a whole, are non-functional or are not accessible; (b) unauthorized exposure of all or part of the City's data; (c) loss or corruption of all or part of the City's data.

  o Request Response Time: 30 minutes.

  o Request Resolution Time: 2 hours.

- Problem Severity 2

  o Description: This Problem Severity Level is associated with significant and / or ongoing interruption of a User's use of a critical function (as determined by the User) of the system/services and for which no acceptable (as determined by the User) work-around is available.

  o Request Response Time: 1 hour.

  o Request Resolution Time: 4 hours.

- Problem Severity 3

    - Description: This Problem Severity Level is associated with: (a) minor and / or limited interruption of a User's use of a non-critical function (as determined by the Authorized User) of the Services; or, (b) problems which are not included in Problem Severity Levels 1 or 2.

    - Request Response Time: 8 hours.

    - Request Resolution Time: 24 hours.

- Problem Severity 4

    - Description: This Problem Severity Level is associated with: (a) general questions pertaining to the system/services; or, (b) problems which are not included in Problem Severity Levels 1, 2, or 3.

    - Request Response Time: 8 hours.

    - Request Resolution Time: 48 hours.

4.5.4   In the event that a problem resolution is not met within the Request Resolution Time, the Vendor will adhere to the following protocol:

- If a Problem Severity Level 1 or 2 request cannot be corrected to the reasonable satisfaction of the requestor within the Request Resolution Time after the requestor makes the initial request for Technical Support, Vendor will: (a) immediately escalate the request to Vendor's management; (b) take and continue to take the actions which will most expeditiously resolve the request; (c) provide a hourly report to the requestor of the steps taken and to be taken to resolve the request, the progress to correct, and the estimated time of correction until the request is resolved; and, (d) every four (4) hours, provide increasing levels of technical expertise and Vendor management involvement in finding a solution to the request until it has been resolved.

- If a Problem Severity Level 3 or 4 request cannot be corrected to the reasonable satisfaction of the requestor within the Request Resolution Time after the requestor makes the initial request for Technical Support, at the sole election of requestor: (a) Vendor will work continuously to resolve the request; or, (b) requestor and Vendor will mutually agree upon a schedule within which to resolve the request.

5.0 PERFORMANCE REQUIREMENTS

5.1 Vendor Instructions

This RFP Section contains general and specific requirements related to the performance of the proposed system, both at the point of system acceptance and throughout the life of the contract between the City of Keller and the Vendor.

System Acceptance will occur in phases as various milestones identified in the implementation plan and agreed to by the City are reached. The Vendors implementation plan must clearly define the hardware and software deliverables, tasks or other criteria associated with each milestone.

5.2 Testing

5.2.1   A sample test plan will be provided with each proposal. The successful Vendor must, as one of the early milestones, submit an acceptance test plan for the City's approval. The test plan must document how each of the functional specifications are to be tested, the method of verifying the results, and the expected results. The test plan must also include a scenario test that allows for the system (integrated hardware/software) to operate under a simulated test situation.

5.2.2   The performance requirements specified in this RFP must be met before the system is accepted. Vendor is to specify any requirements it has for performance testing.

5.2.3   The Vendor must prepare a plan for correcting failures in any part of the system. Said plan must include reasonable remedies for the City to exercise if failures are not corrected in a timely manner.

5.2.4   Performance testing must include full testing of all interfaces to the system.

5.3 System Acceptance

The following specifications apply to the requirements for the City's acceptance of the Vendor's system after phase in begins.

5.3.1   The City expects the starting date for the project to be immediately following the execution of the contract.

5.3.2   Beginning with the first day after the completion of each phase (phases will be specified in the implementation plan) that the proposed system phase is operational and available to the City for testing; an acceptance test will be conducted for thirty consecutive calendar days (the Acceptance Period).

5.3.3   During the Acceptance Period, the proposed system will undergo a live test that confirms the configuration, data conversion, performance and reliability requirements using the mix of users, applications, and functions as described in this RFP.

6.0   IMPLEMENTATION REQUIREMENTS

6.1   Vendor Instructions

RFP Sections 6 contains all general and specific requirements related to the period between site planning and our final acceptance of the system. RFP Section 6.10 contains a list of required contents for your implementation plan.

6.2   General Implementation Requirements

6.2.1   Conduct of Work

All work will be conducted in a professional and orderly manner. Installation must be completed in a skillful manner.

6.2.2   Use of Facilities

Reasonable office facilities will be provided based upon stated requirements of the Vendor. Access to any area outside of normal business hours is restricted; necessary access must be arranged each day as needed with City of Keller's Project Manager.

6.2.3   Qualifications of Implementation Staff

Vendor implementation staff must be fully trained and certified by the manufacturer(s) of the system(s) you propose. Their training must be up-to-date for the specific systems being installed. In addition, all key implementation staff must be experienced in similar prior installations of the system(s).

Additional requirements include:

- Submission of qualifications by Vendor and approval of all key staff members by the City prior to project start
- Maintaining the involvement of Vendor's personnel essential to the project throughout the life of the project, up to and including training, implementation and acceptance
- Timely replacing any staff deemed unqualified by the City
- Directing staff to comply with City rules and regulations.

6.2.4   Documentation

6.2.4.1 General

a. If selected, the Vendor must be able to supply comprehensive hard and soft copy documentation for the system which covers at least the following subjects:

   i) Systems Administration and Management (user privileges, access and security administration, etc.) integrated with Microsoft Active Directory

   ii) Utilities and tools to monitor resource utilization

   iii) Web development tool kit, including API's

iv) System wide Entity Relationship Diagram (ERD) with documentation

v) Toolkit manuals

vi) Report generation scripts/Change Control tools

vii) Legacy Data Migration (Extract, Transfer, Load – ETL).

b. The system documentation must be consistent with the instructions supplied by the internal help systems for the application.

i) The system must include no less than three original copies of documentation describing the use of the system, and its administration. The City requires authority to copy documentation for internal use.

ii) Strong preference to support internal, context sensitive, help which is granular enough to provide help to specific item on the screen without having to scroll through a help file to find the description of the item.

iii) The Vendor must provide a printed database schematic and data dictionaries to assist the customer with the addition of site-specific fields and support for the system. Electronic copy to be provided.

6.2.4.2 Software Documentation

The proposal must include a list and description of the software that is required to operate the proposed hardware/software configuration. Once selected the vendor must provide documentation. Examples of these are:

- Application System Reference
- Application System Tutorial

The City requires that the Vendor provide documentation (1) electronic copy for any software that the Vendor supplies as part of the system configuration.

6.2.4.3 System Implementation Documentation

Prior to commencing work, the Vendor must provide documentation to include systems design for Vendor installed components, with clearly identified interface points to other systems, Implementation Plan, System Test Plan and Procedures, and Training Plan. The delivery of these and certain key documents are expected to be indicated as milestone points on the Work Breakdowns Structure (WBS) of a Microsoft Project Schedule, which will be provided by the Vendor as their first deliverable.

6.2.4.4 Training and Operations Documentation

Several documents will be prepared that will be used in training personnel and/or in operating the system. The Vendor must describe these documents in its pro-posal and specify the number of each that will be delivered to the City.

6.3   Project Management

The City will have a project manager for this implementation project. The City's Project Manager will be the point of contact with the Vendor's project manager in all areas indicated in this RFP section. He/she will be empowered to resolve disputes and make decisions about any changes to the implementation plan or technical aspects of the system. He/she will also provide liaison with City department heads and will assist in coordinating work with the Vendor.

Vendor must also name a project manager. Key expectations for this individual include that this person:

- Will be empowered to authorize project changes.
- Will provide periodic written status reports at a mutually agreed upon time frame.
- Will maintain the involvement of the same Project Manager throughout the project and through implementation.

Subsequent to selection, the Vendor will present the project manager to City management for the City's approval.

6.3.1   Coordination

Vendors must include a review of the project plan in each weekly teleconference briefing, and monthly on-site meeting, or more often if necessary. This briefing must include a review of the tasks accomplished and items delivered or installed. The Vendors Project Manager must keep the City's Project Manager fully informed of any change in schedule and must provide a modified project plan including Gantt Chart for each schedule change of more than one day.

Vendors must deliver written notice to the City no less than two weeks prior to the completion of each milestone. The purpose of this notice must be to allow the City to schedule personnel who may be required to participate in testing or other activities associated with a pending milestone.

6.3.2   Scheduling

6.3.2.1   All proposals must include a preliminary schedule for the implementation of the proposed system components. The City favors a phased order to the deployment. For vendors who are showing multiple module deployments, the City expects to be able to support two module deployments simultaneously. Vendors will recommend a schedule based on their experience with such deployments.

6.3.2.2   The preliminary proposal schedules must include clearly identified milestones and tasks for each of the major activities and events that are planned for completion of the system through the complete system acceptance.

6.3.2.3 The Vendor must be required to finalize a detailed schedule and Implementation Plan, for approval by the City, as part of the contract negotiation process.

6.3.2.4 The detailed schedules must be included as part of the Contract, must be maintained by the Vendor, and must be updated and reviewed with the City at regular intervals as part of normal project management functions.

6.3.2.5 All scheduled changes are subject to the prior approval of the City.

6.3.2.6 Coordination with the City's project manager is required. The City will not be responsible for any extra costs in the implementation phase that are caused by failure on the Vendor's part to coordinate with the project manager.

6.3.2.7 Installation of the main system components must also be coordinated with the City's project manager. Specify what specific interactions will be required, and what time will be required to make any required interfaces.

6.3.2.8 Installation of user equipment in occupied areas must minimize disruption to normal business activities. Specify how this requirement will be met.

6.3.2.9 Implementation of application systems must follow a logical progression, with testing and acceptance of predecessor systems prior to the implementation of additional systems.

6.3.2.10 During testing and startup of the new systems, on-site Vendor technical support is required.

6.4   Site Planning

The Vendor, as part of a walkthrough scheduled with the City after award, will verify the operating environment and recommend the appropriate action for optimal implementation and usage of system by City staff.

6.5   Business Process Review

The Vendor is required to analyze the workflow for each of the work areas that will be impacted by the new applications in order for the vendor to determine the appropriate configuration settings for the system.

6.6   Workflow Configuration

The Vendor is required, utilizing the Business Process Review analysis previously described, to pre-configure the system prior to data conversion and testing by the City's Implementation Team.

It will be the responsibility of the Vendor to provide **complete** workflow configuration into the system. The Vendor will work with the City to assess current business processes, identify gaps, and recommend improvements to utilize the system to its highest capacity. In addition, the Vendor will take these recommendations to build and configure new business processes into the new system.

6.6.1 Business Process/Workflow Configuration Requirements

Outlined below is the list of needed workflows/sub workflows that are required to be fully configured by the Vendor. Each proposal must include a full business process analysis, along with a business process application fit analysis to optimize the current process and take advantage of the vendor's solution potential. The Vendor needs to include the workflow configuration as part of their proposal and any associated costs incurred by this requirement. Use the **Functional Requirements Response Forms, Attachment A2, Workflows tab** to identify the proposed method of configuration for each identified workflow and the associated cost for configuration. Any comments that require a long clarification can be written in the **Proposal Response Forms, Section 6.**

Full workflow configuration means that the Vendor will take the responsibility to configure each workflow individually 100% and work with the City by asking questions about current process and making recommendations to provide the best fit for the highest software utilization.

Workflow Counts	Number
Permitting	
Total Number of Main Workflows	31
Total Number of Sub-workflows	86
Inspections	
Total Number of Inspection Types	62
Planning	
Total Number of Plan Types	23
Total Number of Sub-plan Types	59
Code Enforcement	
Total Number of Code Case Types	2
Total Number of Violation Types	24

City of Keller Permitting Workflows (by Type)

#	PERMIT TYPE	SUB-PERMIT TYPE
1	DETACHED ACCESSORY	
		CARPORT
		DETACHED ARBOR/PERGOLA/PATIO COVER
		DETACHED GARAGE
		OUTDOOR FIREPLACE
		REMODEL
		DECK
		SHED
		OTHER
		ACCESSORY DWELLING UNIT
2	CERTIFICATE OF OCCUPANCY	
		NEW
		TEMPORARY CO

		BUSINESS NAME CHANGE
		OWNERSHIP CHANGE
		CLEAN AND SHOW
3	COMMERCIAL BUILDING NEW	
		NEW
		INITIAL FINISH OUT
		MULTI-FAMILY
		SHELL BUILDING
4	COMMERCIAL REMODEL	
		ALTERATION
		ADDITION
		OTHER
5	DEMOLITION	
		COMMERCIAL
		RESIDENTIAL
6	FENCES	
		RESIDENTIAL FENCE
		TEMPORARY FENCE
7	NEIGHBORHOOD GARAGE SALE	
		GARAGE SALE
8	SWIMMING POOL	
		ABOVE GROUND
		UNDERGROUND
		SPA
9	RESIDENTIAL NEW	
		NEW SFR
		MODEL HOME
		MULTIFAMILY
10	RESIDENTIAL REMODEL	
		ATTACHED ARBOR/PERGOLA/PATIO COVER
		HOUSE MOVING
		MANUFACTURED HOME
		ALTERATION
		ADDITION
		ROOF DECKING

11	SPECIAL EVENT	
		SPECIAL EVENT
12	SIGN	
		WALL
		MONUMENT
		SUBDIVISION ENTRY
		DEVELOPMENT
		DETACHED
		REFACE
		TEMPORARY
		GRAND OPENING
		OTHER
13	ELECTRICAL	
		COMMERCIAL
		RESIDENTIAL
14	MECHANICAL	
		COMMERCIAL
		RESIDENTIAL
15	PLUMBING	
		COMMERCIAL
		RESIDENTIAL
16	IRRIGATION	
		COMMERCIAL
		RESIDENTIAL
17	GENERATOR INSTALL	
		COMMERCIAL
		RESIDENTIAL
18	SOLAR	
		COMMERCIAL
		RESIDENTIAL
19	TREE REMOVAL	
20	MISCELLANEOUS	

21	RIGHT OF WAY	
22	SEWER TIE-IN	
23	GRADING	
24	RETAINING WALL	
25	SIDEWALK	
26	DRIVE APPROACH	
		RESIDENTIAL
		NON-RESIDENTIAL
27	WIRELESS	
		CO-LOCATION
		EQUIPMENT UPGRADES
		MAINTENANCE
28	CONSTRUCTION (PUBLIC IMPROVE-MENTS)	
		RESIDENTIAL
		NON-RESIDENTIAL
		CIP
29	SMALL-CELL NODE	
		EXISTING POLE
		NEW POLE
30	UTILITY BILLING	
		FIRE SUPPRESSION
		LANDSCAPE IRRIGATION
31	FIRE DEPARTMENT	
		FIRE ALARM
		FIXED SUPPRESSION SYSTEM
		TENT/TEMP STRUCTURE
		SPRINKLER
		SPRINKLER - UNDERGROUND
		ACCESS CONTROL - GATE
		ACCESS CONTROL - DOORS
		GAS MONITORING
		EMERGENCY RESPONDER RADIO

		FOOD TRUCK
		HAZMAT
		GENERATORS (NON-RESIDENTIAL ONLY)
		HOT WORK
		OPERATIONAL

City of Keller Inspection Types

#	INSPECTION TYPE
1	Above Ceiling
2	All Seconds
3	Approach
4	Backflow Prevention
5	Brick Ties
6	Certificate of Occupancy
7	CO2 Fire
8	Code Violation
9	Complaint
10	Cross-Connection Compliance
11	Customer Service (CSI) Inspection
12	Daily Inspection
13	Drainage
14	Drainage Final
15	Electrical Rough
16	Electrical Temporary
17	Electrical Underground
18	Energy Final
19	Erosion Control
20	Fat, Oils, & Grease
21	Fence Final
22	Final Inspection
23	Fire Alarm
24	Fire Final
25	Fire Suppression
26	Fireplace
27	Firewall
28	Flood Plain
29	Form Board
30	Foundation
31	Framing
32	Hazmat
33	Illicit Discharge Detection and Elimination
34	Mechanical/Electrical/Plumbing Final

35	Mechanical
36	Miscellaneous
37	Miscellaneous Electrical
38	Miscellaneous Plumbing
39	Notice of Violation
40	Permanent Power
41	Piers
42	Plumbing Rough
43	Plumbing Top Out
44	Plumbing Underground
45	Pool Belly
46	Pool Deck
47	Pool Final
48	Public Works Final
49	Punch List
50	Retaining Wall
51	Rough Grading
52	Screening Wall
53	Sewer Tie-In (Public)
54	Sidewalk
55	Sign Final
56	Site Final
57	Sprinkler
58	Stop Work Order
59	Traffic Control
60	Tree Inspection
61	Water Heater
62	Yard Sewer

City of Keller Plan Types

#	PLAN TYPE	SUB-PLAN TYPE
1	SPRINKLER	
		RESIDENTIAL
		COMMERCIAL
2	UNDERGROUND FIRELINE	
		RESIDENTIAL
		COMMERCIAL
3	FIRE ALARM	
		COMMERCIAL
4	GENERATORS	

		COMMERCIAL
5	ACCESS CONTROL	
		DOORS
		GATES
6	TENTS/TEMP STRUCTURES	
		TENT
		TEMP STRUCTURES
7	FIXED SUPPRESSION	
		RESIDENTIAL
		COMMERCIAL
8	HAZMAT	
		HAZMAT
9	GAS MONITORING	
		GAS MONITORING
10	EMERGENCY RESPONDER RADIO	
11	PLAN AMENDMENTS	
		THOROUGHFARE PLAN AMENDMENT
		FUTURE LAND USE PLAN AMENDMENT
		UDC TEXT AMENDMENT
		ZONING MAP AMENDMENT
12	PLAT APPLICATION	
		MINOR AMENDED PLAT
		MINOR REPLAT
		MINOR FINAL
		MAJOR AMENDED
		MAJOR REPLAT
		MAJOR FINAL
		PRELIMINARY PLAT
		VACATED PLAT
13	DEVELOPMENT APPLICATION	
		SITE PLAN
		PRELIMINARY SITE EVALUATION
		CIVIL PLANS
		LANDSCAPE/SCREENING WALL
14	APPEAL TO TREE PRESERVATION	
		APPEAL TO TREE PRESERVATION

15	ZONING	
		PLANNED DEVELOPMENT
		STRAIGHT ZONING
		SPECIFIC USE PERMIT
16	DEVELOPMENT AGREEMENT	DEVELOPMENT AGREEMENT
		ANNEXATION AGREEMENT
		EASEMENT AGREEMENT
		OTHER AGREEMENT
17	MISCELLANEOUS DEVELOPMENT	
		OTHER
18	MURAL	
		MURAL
19	UDC VARIANCE	
		UDC VARIANCE
20	ZBA VARIANCE	
		ZBA VARIANCE
21	GAS WELL SITE	
		GAS WELL
22	CIP	
		STREET
		TRAFFIC
		WATER
		WASTEWATER
		DRAINAGE
		OTHER
		PARKS
		FACILITIES
23	INFRASTRUCTURE (DEVELOPMENT)	
		INFRASTRUCTURE
		WATER
		WASTEWATER
		DRAINAGE
		FLOODPLAIN
		GRADING
		STREETS
		LANDSCAPE PLANS

City of Keller Code Case Types

#	CODE CASE TYPE	VIOLATION
1	CODE ENFORCEMENT	
		ACCESSORY BUILDING
		BUSINESS IN RESIDENTIAL
		CERTIFICATE OF OCCUPANCY
		FENCE
		GARBAGE
		GRASS & WEEDS
		HEAVY LOAD VEHICLE (HLV)
		JUNKED VEHICLES
		PARKING ON GRASS
		PROPERTY MAINTENANCE (IPMC)
		LANDSCAPE/SCREENING WALL (LSW)
		LIGHTS
		MISCELLANEOUS
		NUISANCE
		SIGNS
		SUBSTANDARD BUILDING
		SWIMMING POOL
		TREES
		WORK W/O PERMIT
2	ENVIRONMENTAL	
		CROSS-CONNECTION
		BACKFLOW PREVENTION
		ILLICIT DISCHARGE
		STAGNANT WATER
		WATER WASTE

6.7 Coordination Meetings

Vendor is required to integrate with the City network and other current applications. Coordination meetings will be required to ensure mutual understanding and shared expectations concerning the nature and extent of interface and integration activities. Further, to assure timely compatibility and connectivity, the schedule as preliminarily detailed below, must be accommodated.

6.8 Phase-in Requirements

Project schedule expectations are provided below.

6.8.1 Vendor is required to analyze the workflow for each of the work areas that will be impacted by the new applications in order to determine the appropriate configuration settings for the system.

6.8.2 All system components must be tested and the results of testing presented to the City project manager per Section 5.

6.8.3 A phase-in plan is required as part of your implementation plan, covering testing, and the sequence and timing of events.

6.8.4 Vendors must have their own personnel at the City site during testing and start-up ("go-live") periods in order to ensure a smooth phase in process.

6.9 Data Conversion

Conversion of all present data files in TRAKiT is required. It is expected that the conversion programs will be thoroughly tested, and that full data sets will be totally converted and loaded into the system during an evening or weekend. Provide the programs/scripts used for scrubbing data (e.g., addresses) prior to data migration. Provide information on the methodology used to ensure all data was properly migrated. Provide information on vendor team utilized for conversion with their experience converting for similarly sized agencies.

The following activities are expected to be performed by the Vendor:

- Data extract from the current software
- Data cleanup of names, numbers, and permit/inspection information
- Geo validation of addresses in the current software to match the City's GIS database
- Data mapping and import into the new system using programs/scripts.

If the Vendor does not offer data extraction or data cleanup, list a 3rd party company that you have worked with that has performed this work for your customers in previous projects. Use the **Proposal Response Forms, Section 6** to supply this information.

6.10 Training

6.10.1 Training Guidelines

The general training approach desired will be training of System Administrators and support personnel for general systems administration and operations, and select staff for

application operations. The Vendors training programs must be designed and conducted to provide complete familiarization in applicable system operation.

The Vendor must describe the types of training classes that will be conducted, the number of persons that can be trained in each session, and the total number of hours required for each person to be trained. The training plan must provide for rotating shift operations.

All training, insofar as possible, is to be conducted on-site in City facilities. A copy of all training materials used by the Vendor is to be delivered to the City upon conclusion of the training.

6.10.2 System Training and Documentation Requirements

The minimum training requirements are outlined at the end of this section. The Vendor should use this as a guideline of requirements and should comment on suggested training.

6.10.3 Training Schedule

With the Implementation Plan, the Vendor must submit a schedule of all proposed training modules with the following information:

- Course summary/outline
- Duration of training for each module
- Maximum class size
- Audience
- Location of training
- Student prerequisites

6.10.4 Training Environment

- The system shall include a training environment that provides the real system and allows users to access training databases.
- Users logged on to the training database must utilize the same commands, forms and system features as users logged on to the live system.
- No data entered or command invoked while logged to the training database must corrupt the live system or noticeably impede the performance of the live system.

6.10.5 Training Volumes

Training proposals must provide for System Administration, Application Software and Report Generation, primarily through on-site training. Additional Vendor classroom training may be proposed. The training requirements are shown below.

Class	Total Trainees	Training Method (Onsite, Train-the-Trainer)
▪ System Administration	5	Onsite
▪ All contracted modules	10 - 15	Onsite, Train-the-Trainer
▪ Ad Hoc Report Generation	5 - 10	Onsite
▪ Organizational Change Management	15-20	Onsite

6.10.6 Ongoing Training

The following requirements are applicable to the provision by Vendor of various categories of training after Implementation and Acceptance:

- Train-the-Trainer capability to be provided with the above.
- Vendor is asked to describe their program for follow-up training, if and when needed. This training is a separately chargeable item.
- Rates for subsequent years are subject to negotiation.
- Vendor may make training available at both Vendors' training facility and, at the City's option, at the City's site.
- Charges for training must be included in Price Proposal Sheet.

6.11 Implementation Plan

Your response to these implementation requirements should be included in the Implementation Plan. This plan can be in your format, but it must:

a. Include a complete schedule of events, consistent with Section 6.6, in narrative and GANTT chart form.

b. Show an implementation schedule that has specifically designated phases; each phase should have its acceptance plan and milestones. The overall implementation plan should combine all phases into a coherent plan.

c. Respond to all of the requirements in this RFP section in the narrative using the same numbering scheme as shown in this RFP. State how each requirement will be met.

d. Be able to be used as a stand-alone document for use by the project managers and implementation staff.

e. Incorporate training on Preventative Maintenance procedures and software, if offered (please describe).

7.0 CONTRACT REQUIREMENTS

7.1 Instructions

7.1.1 The following contractual terms, contained in Section 7, are required. These instructions apply to all quotations or bid submittals and become a part of terms and conditions of any bid packet submitted. Note any exceptions taken to this section in the **Proposal Response Forms, Section 7**.

7.2 Terms

7.2.1 Refer to Attachment A3 - City's Standard Terms and Conditions

8.0 PRICE REQUIREMENTS

8.1 General Information

8.1.1 Important Notice

Please provide your Price Proposal. Vendor shall identify the software and services required to support their Statement of Work.

8.1.2 Price Proposal Format

The price proposal response forms provide specified areas for either On-Premise or Vendor-Hosted SaaS solutions. Vendors are to respond to either section in accordance to their proposed solution. If the Vendor is proposing both solutions, complete two separate price proposals, one for On-Premise and one for Vendor-Hosted.

Submit your price proposal exactly as listed below:

- A summary price proposal, for each option being offered, either on the sheet provided or a comparable form. See RFP Section 8.2 below.

- A set of supporting price details, on the sheets provided or comparable form. See RFP Section 8.3 below.

- Explanatory notes further clarifying how you derived the prices in your proposal, listed on or attached to the supporting price detail sheet.

- A strong preference exists for a software site license to be provided to the City. Explain limitations if otherwise.

- You may also add any further narrative as needed to describe your price proposal.

8.1.3 Evaluation Period

Our price evaluation will use a uniform method for all proposals. The method will be a 5-year life cycle net present value (NPV) analysis using uniform assumptions for economic analysis. We will also consider Vendor supporting price details in the context of the related sections of your functional proposal.

Time for Consideration: Vendor warrants by virtue of submitting the proposal that costs as outlined in his proposal will be good for an evaluation period of two hundred seventy (270) calendar days from the date of proposal opening. *Vendors will not be allowed to withdraw or modify their proposals after the opening time and date.*

8.2 Summary Price Proposal

- The attached summary price sheet is clearly marked.

- Complete the sheet as instructed. Use duplicate or additional sheets as necessary.

- Add explanatory notes as required for clarity.

8.3 Supporting Price Detail

8.3.1 Response Sheets

In addition to the price summary, there are several supporting price detail sheets, in Section Eight, Price Proposal, of the **Proposal Response Forms**; each supporting price detail sheet corresponds to major lines on the Summary Price Proposal. Complete all sheets as instructed on the form. Use duplicate or additional sheets as necessary, but do not change the formats. Add explanatory notes as required for clarity.