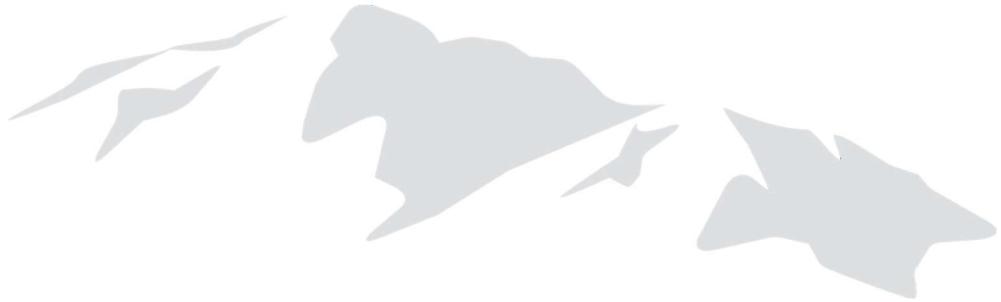




**OGDEN CITY CORPORATION
REQUEST FOR PROPOSAL**

Ogden 311 CRM Software



Prepared by Jess McClelland

Management Services

10/09/2024

OGDEN CITY CORPORATION

REQUEST FOR PROPOSAL

Ogden 311 CRM Software

ADVERTISEMENT

Ogden City is requesting sealed proposals from qualified Proposers to provide an advanced 311 citizen request management system.

Proposal packets are available and may be obtained by downloading from the Ogden City website at <http://ogdencity.com/264/Purchasing>.

Proposers are responsible for securing any and all addenda issued.

A non-mandatory pre-proposal meeting will occur on **October 22, 2024 at 9 AM MDT**.

The meeting will be held via online format. Refer to RFP for details. All firms intending to submit a proposal are encouraged to attend the meeting to obtain relevant information.

Sealed responses to this RFP shall be submitted to the Purchasing Office, c/o 2nd Floor Information / Constable Desk, 2549 Washington Blvd, Ogden, UT, 84401 by **November 5, 2024, no later than 10 AM. LATE PROPOSALS WILL NOT BE ACCEPTED.**

Ogden City reserves the right to accept or reject any proposal as it best serves its convenience and/or is found to be in the best interest of the City.

Ogden City encourages and welcomes bids/proposals from small, local, women, minority, veteran owned businesses and other disadvantaged business enterprises.

Ad Published: October 12 & 19, 2024

OGDEN CITY CORPORATION

REQUEST FOR PROPOSAL

311 CRM Software

I. INTRODUCTION

Ogden City is seeking sealed proposals from qualified Proposers to implement a 311 Citizen Request Management System. The primary objective of this RFP is to identify and partner with a vendor who can deliver a robust solution to streamline and automate our citizen interaction and request management processes. This 311 system will serve as a strategic platform to bridge the communication gap between residents and city services while ensuring requests are managed efficiently and transparently. By fostering a more responsive and accessible system, we intend to significantly enhance the overall citizen experience and operational efficiency of city departments.

In issuing this RFP, the City of Ogden emphasizes the need for a versatile and adaptive system that integrates seamlessly with our current digital infrastructure. The proposed solution must demonstrate compatibility with Tyler Technology's Enterprise Asset Maintenance (EAM) and Enterprise Permitting and Licensing (EPL) systems, GIS for spatial data management, and external tools like Citibot for AI-driven citizen interactions. Through this new system, we are poised to meet the evolving needs of our community, ensuring that all residents have the tools and resources necessary to interact with city services effectively and comfortably.

Goals/Objectives

- **Improve Citizen Engagement**
 - **Seamless Multi-Channel Access:** Enable residents to submit, track, and receive updates on their requests through various platforms including web applications and mobile apps (iOS and Android). This aligns with current

digital communication trends and ensures accessibility for all segments of the population.

- **User-Friendly Interface:** Implement a citizen request management system with an intuitive and easy-to-navigate interface.
- **Real-Time Updates and Feedback:** Provide residents with the capability to receive real-time status updates on their requests and feedback alerts on action taken, fostering transparency and trust in city operations.
- **Enhance Operational Efficiency**
 - **Automated Workflows and Tracking:** Equip city staff with tools to manage requests efficiently through automated workflows, customizable status updates, internal notes, and detailed request tracking. This reduces manual processes and enhances productivity.
 - **Robust Reporting and Analytics:** Provide comprehensive reporting and analytics capabilities to give city administrators insights into request patterns, department efficiencies, and areas for improvement. This data-driven approach enables better resource allocation and strategic decision-making.
- **Integration and Compatibility**
 - **Existing System Compatibility:** The new system must seamlessly integrate with current infrastructure, including Tyler Technology's systems for Enterprise Asset Maintenance (EAM) and Enterprise Permitting & Licensing (EPL), as well as GIS for geospatial analysis and Citibot for AI conversational interfaces. This ensures a cohesive technological ecosystem without disruption.
 - **Standardized Protocols and APIs:** Comply with data sharing standards and provide robust APIs to facilitate data sharing and system interoperability. This approach fosters a scalable and adaptable system that can evolve with future technological advancements and city requirements.

- **Data Security and Compliance**
 - **High Standards of Security:** Implement advanced security measures, including role-based access control (RBAC), detailed audit logs, and secure administrative access to safeguard sensitive citizen and municipal data.
 - **Regulatory Compliance:** Ensure that the CRMS adheres to all relevant data protection and privacy regulations. This not only mitigates legal risks but also demonstrates the city's commitment to ethical data management practices.
 - **Auditability and Transparency:** Maintain comprehensive records and audit trails for all actions within the system to ensure accountability and ease of auditing for compliance checks and reporting.

It is anticipated that this RFP process will result in one OR may result in multiple contract award. The RFP document will become part of the final contract. The contract will be issued for a total period of three (3) years.

II. SCOPE OF WORK or SPECIFICATIONS – Refer to Exhibit A

III. NON-MANDATORY MEETING

A **non-mandatory pre-proposal meeting** will be held on October 22, 2024, at 9 am MDT. We will meet online via Zoom; below are the details.

<https://us02web.zoom.us/j/89715030808>

Meeting ID - 897 1503 0808

Please allow at least one (1) hour for the pre-proposal meeting. All firms intending to submit a proposal are encouraged to attend to obtain relevant information.

IV. RESPONSE TO RFP

Ogden City is seeking proposals from providers capable of providing all the work described in the Scope of Work including attachments.

- A. Each Proposal must include, as a **minimum**, the following information:
1. Authorized Representative – Indicate name, address, email and telephone number of the company submitting the proposal.
 - a. Include the name and contact information of the person designated as authorized to contractually bind the offer.
 2. Company Experience - A description of the firm's experience and capability of fulfilling this contract if awarded.
 - a. Include company history with biographies and/or resumes for principal contacts.
 3. Team Information – Provide the names of any outside consultants and/or subcontractors to be utilized, including contact information and a brief description of their role(s) in the project.
 4. Cost Proposal - A detailed breakdown of the proposed costs. Include a price guarantee period.
 5. Implementation Timeframe – Timeframe to complete the project in months.
 6. System Functionality - Describe the proposed system's operational capabilities.
 7. Ogden City requires that all proposals address certain aspects of software security. Provide verbiage related to the following:
 - a. Data Protection and Privacy Compliance
 - b. Role Based Access Control (RBAC)
 - c. Audit Logging and Monitoring
 - d. Methods used to limit and secure vendor access to data
- B. Proposals are to be no longer than 20 pages. Double-sided pages count as two pages.
- C. For City record-keeping purposes, please do not use spiral or wire binding methods. The following methods will be accepted:
- a. Submitted as loose leaf with binder clip

- b. Submitted in a regular 3-ring binder
- D. Proposals submitted to Ogden City are considered public records, unless protected within [Utah Code 63G-2-1](#).

V. EVALUATION OF PROPOSALS

Proposals will be evaluated in accordance with the criteria listed below:

A. Solution Functionality	40 Possible Points
B. Implementation Timeframe	30 Possible Points
C. Cost / fee proposal	20 Possible Points
D. Software Security	10 Possible Points

A total of 100 possible points may be awarded to one proposal.

The selection committee will primarily be composed of City employees. On occasion, consultants may be invited to participate in the review.

Note that proposals that are received after the deadline or not conforming to the RFP requirements may be deemed non-responsive and eliminated. Each Proposer bears sole responsibility for the items included or not included in the response submitted by that Proposer.

All proposals in response to this RFP will be evaluated in a manner consistent with the Ogden City policies and procedures. Ogden City reserves the right to disqualify any proposal that includes significant deviations or exceptions to the terms, conditions and/or specifications in this RFP. Ogden City reserves the right to disqualify a proposal due to any late response, no response or missed deadline.

In the initial phase of the evaluation process, the selection committee will review all responsive proposals in a cursory manner to eliminate from further consideration proposals which in the judgment of the evaluation committee fail to offer sufficient and substantive provisions to warrant further consideration. At the conclusion of this initial phase, finalist proposals will be selected for detailed review and evaluation.

Ogden City may require an in-person presentation by a Proposer to supplement their written proposal.

Being selected and entering into an agreement does not guarantee the Proposer will be extended any specific amount of work.

VI. SUBMISSION OF PROPOSALS

By November 5, 2024, No later than 10 AM; Proposers shall submit five (5) copies of the proposal in a sealed envelope.

On the envelope, indicate your company's name and the RFP name.

Submit to:

Ogden City Corporation
c/o 2nd Floor Information / Constable Desk
ATTN: Purchasing Office
“Ogden 311 CRM Software”
2549 Washington Blvd.
Ogden, UT 84401

LATE PROPOSALS WILL NOT BE ACCEPTED.

If the sealed proposal is submitted by mail or other delivery service, it must be received prior to the submission deadline.

The sealed Proposal may also be hand-carried to the 2nd Floor Information / Constable Desk at the same address.

No facsimile or email transmittals will be accepted.

It is the sole responsibility of those responding to this RFP to ensure that their submittal is made to the correct location and in compliance with the stated date and time.

City offices are closed on the weekends and observed holidays.

VII. INSURANCE REQUIREMENTS

The successful Proposer shall procure and maintain for the duration of the contract the required insurance against claims for injuries to persons or damages to property, which may arise from or in connection with the performance of this agreement. **The Contractor shall pay the cost of such insurance.**

A. The amount of insurance shall not be less than:

1. **Commercial General Liability:** Minimum of \$3,000,000 commercial general liability coverage with \$1,000,000 for each occurrence. Policy to include coverage for operations, contractual liability, personal injury liability, products/completed operations liability, broad-form property damage (if applicable) and independent contractor's liability (if applicable) written on an occurrence form.
2. **Business Automobile Liability:** \$1,000,000 combined single limit per occurrence for bodily injury and property damage for owned, non-owned, and hired autos.
3. **Workers' Compensation and Employer's Liability:** Worker's Compensation limits as required by the Labor Code of the State of Utah and employer's liability with limits of \$1,000,000 per accident.

B. Each insurance policy required by this Agreement shall contain the following clauses:

1. "This insurance shall not be suspended, voided, canceled, reduced in coverage or in limits except after thirty days prior written notice by certified

mail, return receipt requested, has been given to the Ogden City Corporation".

2. "It is agreed that any insurance or self-insurance maintained by Ogden City Corporation, its elected or appointed officials, employees, agents and volunteers shall be excess of Contractor's insurance and shall not contribute with insurance provided by this policy."

C. Each insurance policy required by this Agreement, excepting policies for Workers' Compensation, shall contain the following clause in a separate endorsement:

1. "Ogden City Corporation, its elected and appointed officials, employees, volunteers and agents are to be named as additional insureds in respect to operations and activities of or on behalf of, the named insured as performed under Agreement with Ogden City Corporation."

D. Insurance is to be placed with insurers acceptable to and approved by Ogden City Corporation. Contractor's insurer must be authorized to do business in Utah at the time the license is executed and throughout the time period the license is maintained, unless otherwise agreed to in writing by Ogden City Corporation. Failure to maintain or renew coverage or to provide evidence of renewal will be treated as a material breach of contract.

E. City shall be furnished with original certificates of insurance and endorsements effecting coverage required within, signed by a person authorized by that insurer to bind coverage on its behalf. **All certificates and endorsements are to be received by Ogden City before work begins on the premises.**

F. City reserves the right to require complete, certified copies of all required insurance policies at any time.

G. Any deductibles or self-insured retentions must be declared to and approved by the City. At the option of the City, either: the insurer shall

reduce or eliminate such deductibles or self-insured retentions as respect to the City, their elected and appointed officials, employees, agents and volunteers; or Contractor shall provide a financial guarantee satisfactory to the City guaranteeing payment of losses and related investigations, claim administration and defense expenses.

H. Contractor shall include all of its contractors as insured under its policies or shall furnish separate certificates and endorsements for each contractor. All coverages for Contractor's contractors shall be subject to all of the requirements stated herein.

I. Nothing contained herein shall be construed as limiting in any way the extent to which Contractor may be held responsible for payments of damages to persons or property resulting from the activities of Contractor or its agents, employees, invitees, or contractors upon the Premises during the License Period.

J. Under the **“Certificate Holder”** section, list the following information:

Ogden City Corporation
2549 Washington Blvd.
Suite 510
Ogden, UT 84401

VIII. GENERAL TERMS AND CONDITIONS

- A. Qualified respondents shall be Licensed Contractors in the State of Utah, for this type of work, and who meet Ogden City's insurance and bonding requirements, and have experience with all work defined in the scope of work.
- B. For projects that are security-sensitive in nature, Ogden City reserves the right to conduct a criminal background check of each person who will be providing services in response to this RFP. If requested, Contractor shall submit a BCI Criminal History Report dated within 30 days of response to RFP for each employee who will be on-site, that shows “Criminal History Verified” and has Arrest History attachments. Employees who have any convictions on their BCI record may be subject to further review and approval by Ogden City. Ogden City

may reject any response to this RFP that involves services from a person or entity that Ogden City determines is unfit or unqualified to fulfill the requirements of this RFP.

- C. All work must meet current industry standards including all Federal, State and local rules and regulations. Specifically, if federal funds are used, proposers must comply with mandatory applicable federal law and regulations.
- D. Ogden City reserves the right to request clarification of the information submitted, and to request additional information from any Proposer.
- E. Ogden City will make every effort to ensure all Proposers are treated fairly and equally throughout the entire advertisement review and selection process. The procedures established herein are designed to give all parties reasonable access to the same basic information.
- F. Cost of Developing Proposals - All costs related to the preparation of proposals and any related activities are the sole responsibility of the Proposer. Ogden City assumes no liability for any costs incurred by Proposers throughout the entire selection process.
- G. Proposal Ownership – Once submitted, all proposals, including attachments, supplementary materials, addenda, etc. become the property of Ogden City and will not be returned to the Proposer.
- H. Conflict of Interest – No member, officer, or employee of Ogden City, during his or her tenure shall have any interest, direct or indirect, in this contract or the proceeds thereof, except as permitted by Ogden City policy.
- I. Non-Collusion – The Proposer guarantees the proposal is not a product of collusion with any other Proposer and no effort has been made to fix the proposal price or any Proposer or to fix any overhead, profit or cost estimate of any proposal price.
- J. Award of Contract - The selection of the company will be made by a selection committee comprised of city employees. Ogden City reserves the right to

negotiate and hold discussions with prospective service providers as necessary, however, Ogden City may award this contract without discussion of proposals received from prospective service providers.

The selected company shall enter into a written agreement with Ogden City.

Ogden City reserves the right to cancel this Request for Proposal.

Ogden City reserves the right to reject any or all proposals received.

Furthermore, Ogden City shall have the right to waive any informality or technicality in proposals received, when in the best interest of Ogden City.

Ogden City reserves the right to segment or reduce the scope of services and enter contracts with more than one vendor.

- K. Pursuant to the Utah Government Records Access and Management Act (GRAMA), records will be considered public after the contract is awarded. If Proposer wishes to protect any records, a request for business confidentiality may be submitted to the Ogden City Recorders Office at the time of submittal.

The form can be accessed through the Recorder's webpage at:

https://www.ogdencity.com/DocumentCenter/View/19762/May-2021-Business-Confidentiality-Claim_revised

IX. ADDITIONAL INFORMATION

Price Guarantee: All pricing must be guaranteed for the duration of the three (3) year term.

Requests for price adjustment must include sufficient documentation supporting the request and demonstrating a logical mathematical link between the current price and the proposed price.

Any adjustment or amendment to the contract will not be effective unless approved by Ogden City.

Price Reductions: It is understood and agreed that the City will be given the immediate benefit of any decrease in the market, or allowable discount.

The contractor will only be allowed to invoice for the cost of services / goods in compliance with the submitted proposal as accepted by Ogden City Corporation.

- A. Invoices must contain a complete description of the work / service / goods that was performed / provided, the contract price for each service, the City purchase order or contract number, and address of service location or delivery address.
- B. Upon the Award of Contract, Contractor may receive a request to process payments electronically.
- C. If offered by Contractor, Ogden City seeks a discount for early payment. The City shall only take such a discount if earned.
- D. Invoices shall be sent to the following address:

Ogden City Corporation
Information Technology Division
2549 Washington Blvd.
Ogden, Utah 84401
Or;
Email invoices to: itbilling@ogdencity.com

X. GOVERNING INSTRUCTIONS

This RFP will constitute the governing document for submitting Proposals and will take precedent over any oral representations.

XI. RFP SCHEDULE

Ogden City will follow the timetable below. Ogden City reserves the right to modify the dates due to unforeseen circumstances. Revision of dates, specifically the RFP response deadline will result in an RFP amendment. Amendments will be published in the City's Purchasing webpage - <https://www.ogdencity.com/264/Purchasing>.

EVENT	TARGET DATE
Open RFP Process	10/9/2024
1 st Ad – Standard Examiner	10/12/2024
2 nd Ad - Standard Examiner	10/19/2024
Pre-Proposal Meeting via Zoom	10/22/2024 @ 9 AM MDT
Last day for Q&A	10/29/2024; No later than 10 AM
RFP Response / Proposal Deadline	11/5/2024; No later than 10 AM
Committee Review and Selection process	To Be Determined
Contract Start Date	To Be Determined

XII. CONTACT INFORMATION

For any questions related to this RFP, please contact the Ogden City Purchasing Office via email purchasing@ogdencity.com or at (801) 629-8742.

The question-and-answer period ends at 10 AM on 10/29/2024.

Please check the City's Purchasing webpage for any published Q&A document(s) that might have already addressed your questions or concerns - <https://www.ogdencity.com/264/Purchasing>.

Thank you for your interest in doing business with Ogden City.

EXHIBIT A

SCOPE OF WORK

Ogden City is soliciting competitive sealed proposals from qualified offerors to provide a user-friendly, integrated, 311 Citizen Request Management Software Solution. The offeror should indicate whether this is achievable and provide a project schedule.

Citizen Request Functionality	
Required	Allow submission of requests via web application and generic mobile app (iOS and Android).
Optional	Allow submission of requests via a city branded mobile app (iOS and Android).
Optional	Allow submission of requests via email.
Optional	Provide a multilingual interface (e.g., Spanish) that is ADA-compliant.
Required	Enable attachment of a photo to a request.
Optional	Enable attachment of multiple photos and other types of files to a request.
Required	Geolocate requests using the user's reporting device or manual adjustment.
Optional	Geolocate requests using metadata from a photo.
Required	Provide a unique incident number to residents after request submission.
Required	Offer real-time status updates via email.
Optional	Offer real-time status updates via in-app notifications.
Required	Allow residents to view their requests.
Optional	Allow residents to update their requests with additional information.
Required	Enable residents to view requests made by others.
Optional	Enable residents to view and follow requests made by others.
Required	Allow residents to submit requests without creating a login if permitted.
Optional	Enable selection of street intersections for request submissions.
Required	Provide a map visualization showing requests around a specific area.
Required	Prompt for potential duplicate requests.
Required	Prompt for potential duplicate requests with the option to follow existing requests.
Required	Reject requests located out of city boundaries.
Optional	Reject requests located out of city boundaries or on non-City owned streets.
Optional	Provide a method for customers to share real-time feedback and/or satisfaction ratings.
Required	Collect and standardize address information using city-provided address validation tools.

Required	Automatically route requests to appropriate departments based on user-selected request types.
Optional	Automatically route requests to appropriate departments based on user-selected request types and/or custom fields.
Required	Allow configuration of custom fields and requirements for each request type.
Required	Display a data privacy notice and obtain user acknowledgment prior to entering any personally identifiable information.
Optional	Allow residents to re-open a request.
Administrative Functionality	
Required	Submit requests on behalf of residents.
Required	Update the status of requests and assign requests to other users.
Optional	Add internal-only notes on requests.
Required	View request status and history.
Optional	Support saveable searches for various issues.
Optional	Manage requests from the field using mobile apps and mobile-responsive web pages.
Optional	View resident contact information and prior communications or requests.
Optional	Link multiple residents, city staff members, and cases together by address.
Optional	Allow simultaneous closure of linked cases with a single action.
Optional	Create multiple requests without re-entering resident information.
Optional	Track information requests that do not result in a departmental service request.
Required	Define and monitor service level agreements (SLAs) by request type.
Required	Customize issue types and assigned departments.
Optional	Customize workflows for request routing based on geolocation.
Required	Provide graphical reporting, monitoring, and analytics capabilities for management.
Required	Support detailed reporting on standard fields.
Optional	Support detailed reporting on standard fields, custom fields, and GIS attributes.
Optional	Integrate a digital library knowledge base and FAQ section to decrease call/request volumes.
Optional	Run reports on the frequency of knowledge base article accesses.
Optional	Publicly display customer request data and resolution data/analytics on the City website.
Optional	Display GIS attributes related to a request on the request record.
Required	Provide interaction notes and call scripts for staff.
Required	Use email templates for frequent requests/issues based on request type.
Required	Display a customized data privacy notice before submission of PII.
Optional	Enable configurable use of ESRI maps or Google maps.

Optional	Provide full access to all data with export capabilities.
Required	Notify assigned staff on overdue requests or incomplete follow-ups.
Optional	Track time and supply costs for request completion.
Optional	Configure custom request statuses.
Optional	Ensure access to a test site for training and testing purposes.
Optional	Flag user-submitted requests for inappropriate content.
	Integration and Compatibility
Optional	Integration of Entra ID (Azure) for single sign-on (SSO).
Required	Integrate with Tyler Technology's Enterprise Asset Maintenance (EAM) system to create service requests and/or work orders within the EAM system. Additionally, the system must provide requestors with real-time updates whenever the status of the related EAM service requests/work orders changes.
Required	Integrate with Tyler Technology's Enterprise Permitting & Licensing (EPL) system to create code enforcement cases. Additionally, the system must provide requestors with real-time updates whenever the status of their code enforcement cases changes.
Required	The system must integrate with Citibot, a chatbot service designed to interact with residents. The integration will enable Citibot to create service requests on behalf of residents and provide unique request numbers to them for tracking purposes.
Required	The system must integrate with the City's GIS system (ESRI) to validate requests' addresses in real time.
Optional	The system must integrate with the City's GIS (ESRI) to allow process automation based on map layer attributes.
Optional	Support for Open311 standards.
	Hosting and Security
Required	Use granular access controls and role-based permissions.
Optional	Ensure 99.9% availability for cloud-hosted systems.
Required	Limit and secure vendor administrative access.
Required	Provide audit logs for staff to track user activities and system events.
	Training and Support
Required	Provide vendor-led training during the implementation.
Optional	Provide access to an online portal with on-demand training resources.
Required	Offer multiple technical support channels (phone, email, online ticketing system).
Optional	Perform periodic system reviews and offer recommendations for optimizations

Price Schedule

- a. The responses must include initial costs (e.g., implementation and interface costs, data migration/conversion costs, software costs, training) and ongoing costs (e.g., annual maintenance fees, support fees, licenses).
- b. Ogden City is exempt from sales, use, and federal excise taxes on these products and/or services. Exemption certificates will be furnished upon request.