

Solicitation RFP-OCMFA-037

Enterprise Records Management System

Bid Designation: Public



The City of
OKLAHOMA CITY

City of Oklahoma City and its Trusts

Bid RFP-OCMFA-037

Enterprise Records Management System

Bid Number	RFP-OCMFA-037
Bid Title	Enterprise Records Management System
Bid Start Date	In Held
Bid End Date	Sep 11, 2024 4:00:00 PM CDT
Question & Answer End Date	Sep 5, 2024 12:00:00 PM CDT
Bid Contact	Aimee Russell aimee.russell@okc.gov
Bid Contact	City Clerk cityclerk@okc.gov
Bid Contact	Shelly Garretson shelly.garretson@okc.gov
Contract Duration	5 years
Contract Renewal	1 annual renewal
Prices Good for	270 days
Standard Disclaimer	This site and system is hosted by Oklahoma City through BIDSYNC for use of The City of Oklahoma City and its trusts. Certain screens and flags may show the name and/or seal of The City; however, such references do not indicate or change the contracting entity.
Bid Comments	The Oklahoma City Municipal Facilities Trust (“Contracting Entity”) is a Public Trust of which The City of Oklahoma City (“City”) is a beneficiary. The Contracting Entity is seeking proposals from qualified organizations to provide a comprehensive solution that meets the requirements outlined in this RFP for a Records Management system. Vendors are invited to propose solutions that address the stated problem and requirements, including leveraging platforms within our existing Technical Environment. The Contracting Entity is seeking an organization with a proven history of success within the records management information systems industry. The Contracting Entity intends to implement a solution that aligns with open system standards and requires minimal to no custom software development to achieve the specified features and functions stated in this solicitation. Evaluation will be based on the value and suitability of the vendor’s products and services, ability to meet or exceed defined requirements, management experience, and the vendor’s overall business viability. This Request for Proposal (“RFP”) sets forth the requirements for the new system and solicits a detailed response from firms to include functional and technical requirements, implementation services, on-going system maintenance and support, pricing, and demonstrations of the proposed solution by finalists as described in the Selection Process section. The Contracting Entity intends to award a contract for the solution, which includes training, implementation, maintenance, and associated services only; however, the firm should propose additional services necessary to meet the requirements listed in this solicitation. The Contracting Entity, at its sole option, reserves the right to purchase hardware separately. Any additional features or modules that are available may be included in the proposal as optional.

Item Response Form

Item **RFP-OCMFA-037--01-01 - RFP-OCMFA-037 - RFP Attachments**

Quantity **1 each**

Prices are not requested for this item.

Delivery Location **City of Oklahoma City and its Trusts**

City of Oklahoma City

200 N. Walker

Oklahoma City OK 73102

Qty 1

Description

Upload your response to the request for proposal as outlined in the RFP and any related documents to this line item. PLEASE DO NOT ZIP FILES

GENERAL INSTRUCTIONS AND REQUIREMENTS FOR PROPOSERS

THESE INSTRUCTIONS, REQUIREMENTS AND ANY SPECIAL INSTRUCTIONS CONTAINED IN THE REQUEST FOR PROPOSAL (RFP) DOCUMENT ARE A PART OF THE TERMS AND CONDITIONS OF THE PROPOSER'S PROPOSAL. ANY EXCEPTIONS TO THESE INSTRUCTIONS, REQUIREMENTS OR THE RFP PACKET, MUST BE SPECIFIED AND SUBMITTED WITH THE PROPOSER'S PROPOSAL. A PROPOSER MAY ALSO SUBMIT EXCEPTIONS BY UPLOADING A SEPARATE DOCUMENT LABELED "EXCEPTIONS" INTO THE BIDSYSNOC SYSTEM. FAILURE TO INDICATE ANY EXCEPTIONS WILL BE REGARDED AS FULL ACCEPTANCE OF THE REQUIREMENTS, INSTRUCTIONS, AND RFP PACKET AND ANY OTHER PROPOSAL DOCUMENTS RELATED TO THIS RFP.

- 1. EXAMINATION BY PROPOSERS:** All Proposers must examine the specifications, drawings, schedules, special instructions and these general instructions and requirements prior to electronically submitting any proposal. Failure to examine is at the Proposer's own risk as the Proposer will be held to the terms, conditions and requirements therein.
- 2. SUBMISSION OF PROPOSALS ELECTRONICALLY TO THE CITY CLERK/SECRETARY:** Proposals timely received electronically through BidSync in the City Clerk's Office shall be forwarded to the Requesting Department for the Selection Committee to open and review. The BidSync system does not allow proposals to be submitted after the deadline. There will be no exceptions to this policy.
- 3. DESCRIPTIVE TERMS:** Unless the term "no substitute" is used, the use of brand name, manufacturer, make, or catalog designation in describing an item does not restrict Proposers to that particular brand name, etc. The term is simply to indicate the type, character, quality and/or performance equivalence of the item desired. However, the proposed substitution item must be of such character, quality and/or performance equivalence as that indicated in the specifications. A proposed substitute item must include complete data as to the manufacturer's name, type, model number, any descriptive bulletins and specifications. This data can be uploaded electronically through the electronic bidding system.
- 4. EXCEPTIONS:** Any exceptions to these instructions, requirements or the RFP packet, must be specified and submitted with the Proposer's Proposal. A Proposer may submit exceptions by uploading a separate document labeled "Exceptions" into the BidSync system. Failure to indicate any exceptions will be regarded as full acceptance of the requirements, instructions and RFP packet and any other proposal documents related to this RFP.
- 5. EXEMPTIONS FROM CERTAIN TAXES:** The purchase of certain goods or services by the Contracting Entity is exempt from the payment of excise, transportation, use, and sales tax imposed by the federal, state and/or city governments. Such taxes must not be included in the bid prices. Any taxes that are not exempt must be included in the proposed price. No additional payment or compensation will be made for taxes.
- 6. PERFORMANCE BONDS:** If required by the RFP document, the successful Proposer must post a performance bond, a certified check, or a cashier's check in the amount required prior to approval of Agreement/Contract.
- 7. PATENTS:** The Proposer agrees to indemnify and save harmless the Contracting Entity, including any of Contracting Entity's employees from all suits and actions of every nature and description brought against the Proposer because of, or for the use of, patented or licensed appliances, products, or processes. The Proposer shall pay all royalties and charges which are legal, and equitable evidence of such payment or satisfaction shall be submitted upon request of the Contracting Entity, as a necessary requirement in connection with the final execution of any Agreement/Contract in which patented or licensed appliances, products, or processes are to be used.
- 8. TERMINATION:**
 - (a) The performance of services and/or the delivery of items under any Agreement/Contract may be terminated by the Contracting Entity, in whole or in part, whenever it is determined to be in the best interest of the Contracting Entity.

- (b) Any such termination will be effected by delivery to the Proposer of a termination notice specifying the extent to which performance or services and/or delivery of work product or system is terminated, and the date the termination becomes effective.
- (c) After receipt of a termination notice, the Proposer shall stop performance of services and/or accept no further orders under the Agreement/Contract.

9. COMPLIANCE WITH APPLICABLE LAWS: All Proposers must comply with all applicable federal, state or local laws and regulations, including Title VI and all provisions of the Civil Rights Act of 1964 42 U.S.C. §§ 2000d, *et seq.*

10. SELF-INSURED: The Contracting Entity is self-insured for its own negligence. The liability of the Contracting Entity for acts of negligence are limited and subject to the Governmental Tort Claims Act, 51 O.S. §§ 151, *et seq.*

11. RIGHT TO AUDIT: The Contracting Entity shall at all times have the right to examine books, papers and records of the successful Proposer relative to all aspects of the Proposer's proposal and the agreements/contracts awarded as a result of this RFP to assess and confirm proposal and Agreement/Contract compliance. Failure to provide the requested information may result in termination of the Agreement/Contract. This right to audit does not apply to Proposer's other contracts or records not affecting the proposal and Agreement/Contract.

12. SAMPLE FORMS: Sample forms are attached to this document. It is not necessary to submit forms with your electronic proposal. The forms will be completed prior to Agreement/Contract approval.

13. PAYMENTS AND DISCOUNTS:

- (a) Payment for goods and services as specified in the Agreement/Contract shall be processed promptly after completion of delivery and acceptance of items and after receipt from Proposer of properly prepared invoice(s) and/or notarized claim voucher(s), if applicable. Purchases may be made by certain City or Trust employees using a purchasing card. Employees of Contracting Entity are required, when possible, to use a purchasing card for purchases under the amount of \$5,000 for a single transaction. For single transactions over \$5,000, the Proposer may request payment be completed by issuance of a purchase order. Processing fees may not be added when a purchasing card is used. The price in the Proposal shall cover any fees a Proposer may incur.
- (b) Discounts for prompt payment will not be considered in proposal evaluations, unless otherwise specified. Discounts offered by the Proposer will be taken, however, if payment is made within the discount period.
- (c) Late charges cannot be assessed against Contracting Entity.

14. CURRENCY: The Proposer agrees that all proposals are to be submitted in U.S. dollars. Proposals submitted in any currency other than U.S. dollars may not be considered. The Proposer also agrees that all invoices shall be submitted in U.S. dollars and agrees to accept payment in U.S. dollars as full satisfaction of the invoiced amount unless otherwise agreed to in a negotiated contract.

Oklahoma Open Records Act and Confidential Information

All materials submitted to the Contracting Entity pursuant to this Bid or Proposal potentially become subject to the mandates of the Oklahoma Open Records Act, 51 O.S. § 24A.1. *et seq.* The purpose of this Act is to ensure and facilitate the public's right of access to and review of government records so they may efficiently and intelligently exercise their inherent political power. Almost all "records," as that term is defined in the Act, may be disclosed to the public upon request. Except where specific state or federal statutes create a specific and express exemption or confidential privilege, persons who submit information to public bodies have no right to keep this information from public access nor have a reasonable expectation that this information will be kept from public access.

If you believe that any of the information you have submitted to the Contracting Entity pursuant to this Bid or Proposal is exempt or confidential under a specific state or federal statute, and therefore not subject to public access under the Oklahoma Open Records Act, you must comply with the following:

1. Place said documents/records in a separate electronic file attachment marked “Confidential”. DO NOT label your entire Bid or Proposal as “Confidential” – label only those portions of the Bid or Proposal that you feel are exempt or are made confidential by state or federal law as “Confidential”.
2. For each such document for which you are claiming an exemption or a confidential privilege, identify the federal and/or state law that creates said privilege, e.g., for trade secrets, see 21 O.S. § 1732 (Larceny of Trade Secrets) and the Uniform Trade Secrets Act, 78 O.S. § 85 et seq.

Should an Open Records request be presented to the Contracting Entity requesting information you have identified as “Confidential,” you will be responsible for defending your position in the District Court, if needed.

If you fail to identify any records submitted as part of your Bid or Proposal as “Confidential”, you are agreeing that said records are not exempt or confidential and are subject to public access.

Upon receipt of a request by a third party to review or copy records properly identified as “Confidential,” you will be notified of the request and thereby given an opportunity to immediately enforce and protect your rights by initiating an action in a court of competent jurisdiction. Should you fail to timely bring an action to enforce your rights, then the requested records will be released by the Contracting Entity based upon its determination of the application of the Oklahoma Open Records Act.

This form is a sample only and should not be submitted with proposal. Forms will be completed prior to agreement approval.

NON-DISCRIMINATION STATEMENT

The Proposer agrees, in connection with the performance of work under this Agreement/Contract:

a. That the Proposer will not discriminate against any employee or applicant for employment, because of race, creed, color, sex, age, national origin, ancestry or disability. The Proposer shall take affirmative action to insure that employees are treated without regard to their race, creed, color, age, national origin, sex, ancestry or disability. Such actions shall include, but not be limited to, the following: employment, promotion, demotion or transfer, recruitment, advertising, lay-off, termination, rates of pay or other forms of compensation and selection for training, including apprenticeship. The Proposer agrees to post, in a conspicuous place available to employees and applicants for employment, notices to be provided by the City Clerk/Secretary of the Contracting Entity setting forth the provisions of this section, and;

b. That the Proposer agrees to include this non-discrimination clause in any subcontracts connected with the performance of this Agreement/Contract.

c. In the event of the Proposer's non-compliance with the above non-discrimination clause, this Agreement/Contract may be canceled or terminated by the Contracting Entity. The Proposer may be declared by the Contracting Entity ineligible for further Agreement[s]/Contract[s] with the Contracting Entity until satisfactory proof of intent to comply is made by the Proposer.

**THIS FORM MUST BE COMPLETED BY THE PROPOSER PRIOR TO
AGREEMENT/CONTRACT AWARD**

~~Sign Here~~ _____
Signature of Individual Title

Printed Name of Individual

Company Name and Address Zip Code

Telephone Number and Fax Number if any

This form is a sample only and should not be submitted with proposal. Forms will be completed prior to agreement approval.

NON-COLLUSION AFFIDAVIT

The undersigned, of lawful age, being duly sworn, upon oath, deposes and says: That the undersigned has the lawful authority to execute the within and foregoing proposal/bid for, and on behalf of, the Proposer/Bidder; that the Proposer/Bidder has not, directly or indirectly, entered into any agreement, express or implied, with any Proposer/Bidder, having for its object the controlling of the price or amount of such proposal/bid, the limiting of the proposals/bids or the Proposers/Bidders, the parceling or farming out to any Proposer/Bidder or other persons, of any part of the Agreement or any part of the subject matter of the proposal/bid, or of the profits thereof, and that Proposer/Bidder has not and will not divulge the sealed proposal/bid to any person whomsoever, except those having a partnership or other financial interest with the Proposer/Bidder in the said proposal/bid, until after the said sealed proposals/bids are opened.

The undersigned further states that the Proposer/Bidder has not been a party to any collusion: among Proposer/Bidders in restraint of freedom of competition, by any agreement to bid at a fixed price or to refrain from proposing; or with any City/Trust official, City/Trust employee or City/Trust agent as to the quantity, quality, or price in the prospective Agreement, or any other terms of the said prospective Agreement; or in any discussions between the Proposers/Bidders or City/Trust official, City/Trust employee or City/Trust agent concerning the exchange of money or other thing of value for special consideration in the letting of Agreement. The Proposer/Bidder states that it has not paid, given or donated or agreed to pay, give or donate to any City/Trust official, officer or employee of the City or awarding agency, any money or other thing of value, either directly or indirectly, in the procuring of the award of Agreement pursuant to this Proposal/Bid.

Witness the hands of the parties hereto:

The undersigned states that the Proposer/Bidder will be bound by its proposal/bid, the specification, the terms and conditions of the Agreement, and the Requirements for Proposer/Bidders.

→ THIS FORM TO BE COMPLETED BY THE PROPOSER/BIDDER PRIOR TO AGREEMENT APPROVAL ←

Type Name of Authorized Agent/Representative Title

Signature

Company Name

Address Zip Code

Telephone Number and Fax Number, if any

TO BE COMPLETED BY THE NOTARY:

State of * _____)
County of * _____) SS.
[*State and County where notarized must be written in for bid/proposal to be considered.]

Signed and sworn to before me on this _____ day of _____ by _____
[Day] [Month] [Year] [Print the name of the agent/representative who signed above.]

My Commission Number: _____ [Oklahoma] _____ Type Name of Notary Public

My Commission Expires: _____ [Date/Year] _____ Signature of Notary Public
[49 Okla. Stat. 2011 §119]

This form is a sample only and should not be submitted with proposal. Forms will be completed prior to agreement approval.



**The City of
OKLAHOMA CITY**

Updated 2019

(Internal use only)
PeopleSoft Vendor ID: _____ Entered by: _____
Helpdesk Ticket #: _____ Date: _____

VENDOR REGISTRATION FORM

Please print legibly or type this information. Form must be completed and signed by authorized individual.

If you are a single member LLC classified as a Disregarded Entity on your W-9, you MUST provide the owner's SSN or EIN, not the LLC's EIN (see IRS pub 3402).

- NEW DOMESTIC VENDOR** - Attach the most current IRS W-9 form, along with this form; both MUST be filled out in their entirety.
- NEW FOREIGN ENTITY** - Attach the most current, appropriate, IRS W-8 form, along with this form; both MUST be filled out in their entirety.

Please provide the City Department or Employee you are working with:

_____ City Department

_____ City Employee

- UPDATE EXISTING VENDOR** - Attach the most current IRS W-9/W-8 form, along with this form; both MUST be filled out in their entirety.

Select all types of applicable update(s):

- Address Name Tax ID Contact Information ACH/EFT Other: _____

How did you hear about us? _____

SDBE Program: Please select all applicable vendor characteristics:

- Disadvantaged Business Enterprise
- Small Business - as defined by the U.S. Small Business Administration DUNS Number - _____
- Women-Owned Business - % women owned / controlled _____%
- Minority-Owned Business - % Minority owned / controlled _____%

Ethnicity(ies) _____

If you checked any of the above boxes, please provide a brief description of your business: _____

If you checked any of the above boxes, do you wish to receive notifications of upcoming contract opportunities?

Do you wish to receive payments by electronic funds transfer?

Check here if same as PO address

PURCHASE ORDER ADDRESS

BUSINESS NAME _____

ADDRESS 1 _____

ADDRESS 2 _____

CITY _____ STATE _____ ZIP CODE _____

CONTACT PERSON _____

EMAIL ADDRESS _____

TELEPHONE NUMBER _____

PAYMENT REMITTANCE ADDRESS

BUSINESS NAME _____

ADDRESS 1 _____

ADDRESS 2 _____

CITY _____ STATE _____ ZIP CODE _____

CONTACT PERSON _____

EMAIL ADDRESS _____

TELEPHONE NUMBER _____

Any vendor who accepts payment confirms the following: the invoice is true and correct; the work, service or materials as shown by the invoice or claim have been completed or supplied in accordance with the plans, specifications, orders or requests furnished the vendor; and the vendor has made no payment, directly or indirectly, to any elected official, officer or employee of this City, of money or any other thing of value to obtain payment See [62 O.S. § 310.9](#).

I certify that the information supplied herein is correct and that neither the applicant nor any person (or concern) in any connection with the applicant as a principal or officer is now debarred or otherwise declared ineligible by a public agency for bidding or furnishing materials, supplies or services, to any other public agency thereof. NOTE: Article IV, Section 11 of the City Charter prohibits employees of the City from having a proprietary interest in City Contracts See [11 O.S. § 8-11](#).

Return to Procurement Services:
vendorregistration@okc.gov
100 N. Walker, Suite #200
Oklahoma City, OK 73102
(405) 297-2741 Fax (405) 297-2142

Signature of Person Authorized to Sign _____ Date Signed _____

Print Name _____ Title _____

Detailed System Requirements

System Requirements Document

Explanation

The following requirements apply to all security information and performance management processes and activities. Each requirement is listed with its Merit or Importance to the City.

Merit is indicated as follows:

C = Critical

I = Important

D = Desirable

Indicate with the appropriate response in the response column as to what degree your system will meet the requirement. Below, you will find the legend for the columns:

Response	Explanation	
Full	Fully Meet	System can fully meet with no configuration or customization
Config	Meet with Config	System can meet with a configuration (configurable by user, no effect on future upgrades, etc.)
Custom	Meet with Custom	System can meet with a customization (modification to code, impairs future upgrades, etc.)
3rd Party	Meet with 3rd Party	System can meet using a third party
None	Cannot Meet	System cannot meet the requirement
Other	Other	Alternative solution (Please explain in comments section)

The evaluation team will confirm all information. Any proposing firm found to be submitting false information may be subject to immediate disqualification.

Comments on requirements are encouraged to enhance a proposer s solution on that specific requirement.

Please specify in the comments section if there is any additional cost above what has been proposed to meet a requirement.

Functional System Requirements

Item	Requirement	Merit (C,I,D)	Response	Comments
General Functionality				
1	The system provides required fields field-level validation for data entry to ensure entry of complete information	C	<input type="text"/>	<input type="text"/>
2	Ability to define user groups with varying security levels for interactions (Create, Read, Update, Delete) within the system	C	<input type="text"/>	<input type="text"/>
3	Ability to apply varying security levels for users: system level, department level, folder level, and document level.	C	<input type="text"/>	<input type="text"/>
4	Provides automatic date and timestamp by user ID for all activity in the system and keeps an audit trail of all activity in the system (edits, deletions, etc.)	C	<input type="text"/>	<input type="text"/>
5	Vendor will provide at least a 30-day notice for patches, upgrades, updates, backup processes, mass updates to data.	I	<input type="text"/>	<input type="text"/>
6	Ability to interpret and process data by defined field types (i.e. dates, numbers, text, etc.)	I	<input type="text"/>	<input type="text"/>
7	The City will retain full access and control of all datasets even if the City migrates to a different platform at a later time	C	<input type="text"/>	<input type="text"/>
8	Ability to generate automated	I	<input type="text"/>	<input type="text"/>

	communications based on predetermined rules (i.e. email, system messaging, notifications, etc.)			
9	Ability to create workflows for creation, approval, and publication of documents/records.	I		
10	Ability to incorporate responsive design features in all views	C		
11	System should be device agnostic providing full functionality for each device.	I		
12	Ability to provide permissions based interactive reports	I		
13	Ability to provide automatic import of data from other City systems through standard APIs and Boomi iPaaS Middleware	C		
14	Ability to publish data and/or reports to various audiences - public/internet, within the organization and/or private	I		
15	Ability to create and save custom views or dashboard per profile/user	I		
16	Ability to share custom views with other users	D		
17	Ability to export and save custom views in various standard open data formats (pdf, csv, rtf, docx, xlsx, etc.)	I		
18	Ability to add annotations on visualizations to add additional context based on permission level	I		
19	Capable of returning documents for multiple departments or functions when performing a search. (e.g., search for a project, get the contract, amendments, claims)	C		
20	Ability to share reports directly from the system with individual users by email or publish externally	D		
21	Ability to provide a permissions based report dashboard	I		
22	Ability to set dashboard permissions by role and/or user (Please explain in the comments section)	D		
23	Ability to mark records as confidential records	C		
24	Ability to restrict access to confidential records as defined by security permissions (Please explain in the comments section)	C		
25	Ability to restrict access to confidential records as defined by document type	C		
26	Ability for users to drill down into the desired file from the top folder level to file (please explain)	I		
27	Ability for users to drill directly into the desired file from a view or dashboard	I		
28	Ability to save filtered search criteria for future use	I		
29	Ability to use Boolean search.	C		
30	Ability to inherit the data fields from parent folder	I		
31	Ability to auto-populate data based on project number/contract number/other data point/location etc. (please explain)	I		
32	Ability to mass/global update to specific data fields and sets.	C		
33	Ability to automate and schedule publishing data to the public/internet with appropriate permissions	D		
34	Ability to access datasets and/or documents with redacted and/or full	C		

	data (public vs private) set by permission level.			
35	Ability to auto-redact information when providing to the public.	I		
36	Provides detailed usage and statistical metrics for online activity, including but not limited to the following with the purpose of guiding engagement (# of views of a dataset, # of downloads, top 10 datasets by date, time, region, language; demographic) Provide sample metric screenshots	D		
37	Provides an Open API that allows full feature access to datasets, visualization, metadata, etc.	I		
38	Ability to integrate easily with GIS and handles ESRI GIS formats for mapping data	I		
39	Ability to export GIS data in multiple standard file formats	I		
40	Ability to provide standard, custom, and ad hoc reporting capabilities	C		
41	Provides indicators to signify predefined exceptions (such as missing data)	I		
42	Ability to define and manage metadata fields for records, including but not limited to title, description, creator, date created, classification, and retention period.	C		
43	Provides a public-facing web portal to display records that are designated as public	D		
44	Data conversion including documented methodology to convert existing data to the new system including, but not limited to, requirements definition, analysis of files, design, development and testing of conversion programs, installation and acceptance (Please detail in the comments section)	I		
45	Ability to provide static links (please define)	D		
46	Ability to provide dynamic links (please define)	C		
47	Ability to convert documents physical to electronic (scan) within the system	C		
48	Ability to integrate with scanning softwares. (please list supports software in the comments)	C		
49	Ability to import documents and metadata.	C		
50	Ability to inventory physical record locations.	C		
51	Ability to barcode/ID physical records in association to their location.	C		
52	Ability to ID electronic records and documents.	C		
53	Ability to handle multiple file extensions. Video, audio, foreign extensions, PDFs, etc.	C		
54	Ability to handle extremely large files. i.e., terabytes.	C		
55	Ability to add and manage different levels of physical storage locations	C		
56	Ability to assign files to boxes	C		
57	Ability to assign boxes to shelving locations	C		
58	Ability to check physical files in and out to staff and locations	C		
59	Ability to for administrators to apply	I		

	visual indicators for documents and datasets i.e. legal hold, ready for destruction, etc. (Please explain in the comments)			
60	Ability to create a legal hold status for records	C		
61	Ability to set parameters of legal holds. (ie duration, review reminders, suspension of destruction, classification) Please explain in the comments section	C		
62	Ability to apply and remove a legal hold to individual items.	C		
63	Ability to apply to and remove a legal hold on a collection of items.	C		
64	Ability to apply to and remove a legal hold on all contents of a folder.	C		
65	Ability to run legal hold searches.	C		
66	Ability for individual files to have more than one legal hold applied.	C		
67	Ability to edit data fields within the search results per user permissions and business rules and edits captured in the audit trail. (explorer or list mode)	I		
68	Ability to have cascading data fields based on classification, category, or doc type.	I		
69	Ability to apply optical character recognition (OCR) to all documents entered into the system.	C		
70	Ability to search document contents. i.e. optical character recognition (OCR).	C		
71	Ability to search all contents (global search).	C		
72	Advanced searches with the ability to limit options to "this", "not", "that", "contains", "and/or". Limiting/restricting search results by filtering.	I		
73	Ability to narrow the search results with filtering i.e. department, doc types, metadata etc.	I		
74	Automated retention reports.	I		
75	Ability to have dashboard send email notification to opted-in individuals based on specific events.	D		
76	Ability to configure a retention schedule	C		
77	Ability to assign retention schedule to individual records, folders and collections	C		
78	Ability to automate the assignment of a retention schedule based on a defined or configured classification	C		
79	Ability to provide alerts/notification based on reaching retention expiration	I		
80	Ability to configure retention review workflows for approval and destruction.	C		
81	Can produce a disposition/destruction certificate or record that includes the name of the record, authorization of destruction, record date, and destruction date.	C		
82	Workflows for the creation, review, approval, and publishing of governing documents. i.e. Policies, standards, procedures, memos that set policy.	I		
83	Must comply with current ADA guidelines and practices meeting or exceeding WCAG 2.1, Level AA.	C		

84	Ability to create a collection.	C		
85	Ability to export the collection data.	C		
86	Ability to assign classification to files/documents	C		
87	Ability to batch multiple files and add metadata to the batch and/or each individual file within the batch.	I		
88	Ability to classify items that require permanent retention.	I		
89	Ability to import emails and email attachments as separate records.	D		
90	Ability to link email attachments to the original email as a companion/related document.	D		
91	Ability to link documents to mapping services.	D		
92	Field names on screens and reports should be customizable by authorized users.	D		
93	System should include a configurable workflow process to include review and approval actions. Workflow process definition and modifications must be available to Departmental personnel, and workflows must be capable of being re-directed as needed.	I		
94	Workflows should not require vendor assistance in configurability.	I		
95	Ability to configure permissions by user, group, role or business function and allow a user to exist in multiple groups, roles or functions	C		
96	Ability to recognize duplicate records and notify the record owner to review. Please explain in comments.	I		
97	Ability to auto-populate a title based on data fields.	I		
98	Ability to manage or control records centrally but the record and data is left in the source system.	D		
99	Ability to display records without source software. Please define in comments.	C		

Technical System Requirements

Item	Requirement	Merit (C,I,D)	Response	Comments
100	City data gathered in this system MUST remain isolated from other customers. We do not allow our data to be mixed into the same database or other systems with other customers.	C		
101	Ability to provide real-time remote control support of the application through a vendor provided remote desktop support software (i.e. Skype, WebEx, Go-To Meeting, TEAMS etc.).	I		
102	Vendor has the ability to provide redundancy to ensure maximized up time.	C		
103	Database backed up on a regular basis (detail in the comments area).	C		
104	The desired solution should have the ability to easily handle the load from our environment size, and to scale as the City resource requirements grow.	C		
105	Product must have features to make dealing with large environments easier, especially in the area of system maintenance.	C		
106	Product needs to be able to gather and	C		

	forward logs and events into the centralized solution for correlation and alerting.			
107	Solution should utilize best practice system recovery in the event of a loss. Please explain recommended recovery options in the comments section.	C		
108	Offer a user interface which is native to the application, that can be accessed using most recent version of Edge, Google Chrome, Firefox, Safari, etc. and be backward compatible to at least three previous version(s).	C		
109	The solution must accommodate individuals with disabilities in accordance with the Americans with Disabilities Act (ADA).	C		
110	System must provide group and user security. Please explain in comments.	C		
111	Application Administrator can manage security, maintenance tables, user logins and access.	C		
112	Supports multiple concurrent users accessing and editing the system at once (detail if there are any limits to the number of users in the system at the same time editing the same item).	C		
113	All standard user accounts for the system should be maintained within the City's Active Directory environment to ensure adherence to the City's password policy and account management standards and processes. The system must either use SAML 2.0 Single Sign on (SSO) or authenticate users directly with Active Directory (if the system being proposed is hosted on premise).	C		
114	Online screens must be fully compatible with latest Operating Systems (See Technical Environment)	C		
115	Always able to use the most up to date software with minimal down time for new upgrades and features which should be implemented as part of regular vendor support services.	C		
116	Flexible scheduled maintenance windows that limit down time (detail in the comments area).	C		
117	The system provides for version change control to maintain update information for modification support purposes whether vendor or self-hosted.	C		
118	There is a provision for non-technical, complete, and easy-to-read user documentation, including reports, online functions, screen illustrations, data entry requirements and diagrams of table links.	C		
119	The system provides online help features at all screen levels.	C		
120	The system provides user-defined help message text.	D		
121	The system offers industry standard backup and retrieval processes.	C		
122	Provide application error codes and definitions.	C		
123	Database used to store the City's data must be ODBC (Open Data Base Connectivity) compliant, allowing the City to access and report on its data. (Please explain in the comments section)	I		
124	Vendor sends communications regarding software enhancements, bug fixes, new releases, and upgrades before they occur via email, newsletter, or system notifications. (please explain the communication process in the comments section)	C		

125	Vendor facilitates weekly, monthly, or yearly meetings and/or calls that discuss system issues, development needs, and enhancement requests for user groups with vendor moderation.	I		
126	The system can comply with all requirements listed in section Technical Environment where applicable.	C		
127	Provide database table layout with primary and foreign keys	C		
128	The product accommodates date and calendar functions and its implication on various system processes.	C		
129	The system provides maintenance software that will periodically review the tables and identify any data inconsistencies and incomplete records and produce exception reports	C		
130	The solution agent should perform checks to ensure it has moved all logs before logs are purged from the source (end point).	I		
131	Ability to provide deep links: individual documents need to be URL addressable.	C		
132	System must provide Test Environment and Production Environment	C		
133	Ability to leverage SharePoint Online Records Management/Retention Features in City's existing Microsoft 365 Tenant (GCC) Please explain in the comments	D		
134	The system must use encryption standards such as AES-256 for all data at rest.	C		
135	The system must use encryption using TLS 1.2/1.3 or equivalent protocols for data in transit.	C		
136	The data must be stored and processed within the continental United States, ensuring compliance with local data residency and sovereignty laws.	C		
137	The system provides role-based access controls to ensure users have the minimum necessary access.	I		
138	The system can integrate with our security information and event management (SEIM) solution for continuous monitoring.	D		
139	The system must store detailed logging of access and activity with tamper-evident logs for a minimum of a year.	C		

Interface Requirements

Item	Requirement	Merit (C,I,D)	Response	Comments
140	The system is able to utilize the City's Active Directory for internal user authentication.	C		
141	Ability to interface with the City's Microsoft Outlook email system.	C		
142	Ability to interface with other systems using standard APIs and Boomi iPaaS Middleware.	C		
143	Ability to import flat file (.csv, .txt, .xls) Please explain in the comments section	C		
144	Please explain how many different systems your product can integrate with? Different price for additional system integrations? Please explain in the comments section	C		
145	Ability to integrate Capture On Touch scanning software	I		
146	Ability to interface with SharePoint	C		

	Online			
147	Ability to interface with Accela	C		
148	Ability to migrate records from SharePoint Online	C		
149	Ability to interface with PrimeGov	C		
150	Ability to provide a standard REST API	C		
151	Ability to interface with CityWorks	C		
152	Ability to interface with Idea	D		
153	Ability to interface with Oracle	C		
154	Ability to interface with iNovah	C		
155	Ability to interface with Quickbooks	D		
156	Ability to interface with Canto	I		
157	Ability to migrate records from Canto	I		
158	Ability to interface with XplorRec	C		
159	Ability to interface with Laserfiche	C		
160	Ability to interface with Encode	I		
161	Ability to interface with BidSync	I		
162	Ability to interface with JitBit.com	I		
163	Ability to migrate records from ApplicationXtender	C		
164	Ability to interface with Aurigo - Masterworks Program Management Information System (PMIS)	C		
165	Ability to interface with Chamelon	D		
166	Ability to interface with Office 365 (GCC)	C		
167	Ability to interface with Access Databases	D		
168	Ability to provide address validation where applicable address and location data entry fields will be validated against the City's ESRI GIS data, either directly or by a continually updated derivative geofile. Please detail in the comments section.	D		
169	Ability to interface with Oragami	I		
170	Ability to interface with M5	I		
171	Ability to interface with PrintShop Pro	I		

Vendor Requirements

Item	Requirement	Merit (C,I,D)	Response	Comments
172	Offer routine training seminars/conferences. Please provide training availability, details, locations and cost in the comments section.	D		

173	Swift response time on request(s) for minor and/or major changes(s) (Please specify communication/response procedures in the comments area).	C	<input type="text"/>	<input type="text"/>
174	Vendor will destroy any City data collected by vendor or within vendor systems within 24 hours of request, and provide written confirmation and method used upon completion.	C	<input type="text"/>	<input type="text"/>
175	A large user-community, or forums, available for quick answers, best practices, and product research, without having to contact support directly.	D	<input type="text"/>	<input type="text"/>
176	Vendor should have the ability to show a history of incorporating customer feedback into patches/releases of the product.	C	<input type="text"/>	<input type="text"/>
177	This project will receive the full attention and support of the vendor.	C	<input type="text"/>	<input type="text"/>
178	The solution includes complete training material (manual or automated) to provide for initial and ongoing training requirements.	C	<input type="text"/>	<input type="text"/>
179	Training material must be customized to the actual training provided to The City of Oklahoma City (not generic training manuals).	C	<input type="text"/>	<input type="text"/>
180	The product is supported through a support line staffed by business and technical professionals. Describe support tiers and availability in terms of hours and days, (i.e. 24-hours a day 7 days per week).	C	<input type="text"/>	<input type="text"/>
181	Provide proprietary release for copying documentation.	C	<input type="text"/>	<input type="text"/>
182	Project Manager shall remain constant throughout implementation and any change in Project Manager must be approved, in advance, by the City.	C	<input type="text"/>	<input type="text"/>
183	Vendor must provide escalation options for support questions	C	<input type="text"/>	<input type="text"/>
184	The vendor has a record of responsiveness to the needs of its installed customer base. Specifically, the vendor will respond to all problem requests received from the City. An initial response will be received within 2 hours, critical problems will be addressed and resolved within 8 hours, with all other production problems addressed and resolved within 48 hours. If the need arises, the vendor will have individuals on-site.	C	<input type="text"/>	<input type="text"/>
185	Dedicated Account Manager or Service Specialist and a support process to log issues, track status and request system enhancements (Please specify communication procedures in the comments area).	C	<input type="text"/>	<input type="text"/>
186	Schedule and coordinate installation of the mandatory application software.	C	<input type="text"/>	<input type="text"/>
187	Schedule and coordinate data conversion for integrated application software modules and mapping of data.	C	<input type="text"/>	<input type="text"/>
188	Schedule and coordinate classes needed for technical training as part of the implementation.	C	<input type="text"/>	<input type="text"/>
189	Schedule and coordinate installation of the database.	C	<input type="text"/>	<input type="text"/>
190	The City of Oklahoma City will receive priority service for product modifications and releases.	C	<input type="text"/>	<input type="text"/>
191	Coordinate Hardware and Software	C	<input type="text"/>	<input type="text"/>

	Implementation with City Staff.			
192	The vendor will notify the City's IT Security Team within 24 hours of discovery of any breaches associated with the vendor or their subcontractors.	C		
193	Provide the City with a list of vendors that will be accessing City data.	C		
194	Vendor maintains compliance with the most current published NIST compliance framework.	C		
195	Vendor is able to provide written documentation detailing processes/policies supporting compliance with most current NIST compliance framework.	C		
196	Vendor notifies the City in writing within 8 business hours of any changes in personnel accessing City data.	C		
197	Vendor provides written verification of data destruction by the City within five business days upon request.	C		
198	Vendor responds to audit requests by the City within five business days.	C		
199	Data resides in the United States for cloud based solutions.	C		
200	City of Oklahoma City owns all data related to the City's use of the solution.	C		
201	Ability to follow all regulatory data controls as applicable including NIST 800-171	C		
202	Ability to follow all regulatory data controls as applicable including ISO 27001	D		
203	Ability to follow all regulatory data controls as applicable including CJIS	C		
204	Ability to follow all regulatory data controls as applicable including HIPAA	C		
205	Ability to follow all regulatory data controls as applicable including PCI	C		

PRICING WORKSHEET

GENERAL

The City does not anticipate requesting best and final offers. It is the City's intent to evaluate and score the proposed pricing submitted with your proposal. Any discounts (including time sensitive discounts based on date of contract approval), trade-ins, cost incentives, or signing bonuses you intend to extend to the City should be contained within your proposal.

Include pricing for **all** required components, services (including but not limited to phone room support and support of third party systems), and tasks required to implement a working, **fully functional system**. Any and all components - whether hardware, software or services - required to make the system usable and fully operational that is not described in the proposal documents as being necessary, shall be provided at the Proposer's expense. The price listed in the proposal shall be the delivered price, including freight to and installation at the site(s) of work in Oklahoma City. Submission of a proposal shall be conclusive evidence that the Proposer has investigated and is satisfied as to the conditions to be encountered in performing the work.

PRICING FORMAT

One of the significant evaluation challenges will be the cost comparison of potentially dissimilar systems. The City expects to negotiate the final configuration and scope of systems with the preferred proposer based upon proposal evaluations and City approval. Consequently, City personnel must be able to derive the costs associated with configuration modifications and alternative options. Price proposals must provide sufficient information to accommodate such activities.

Failure to provide pricing information in accordance with these requirements will result in point deductions associated with Section Selection Process, item C.

On-Premise Solution	Price	Comments
A) Initial Software Licensing (Software & Hardware Maintenance for year 1 included)	\$ <input type="text"/>	<input type="text"/>
B) Implementation/Professional Services	\$ <input type="text"/>	<input type="text"/>
C) Annual Professional Services (24/7 Support)	\$ <input type="text"/>	<input type="text"/>
D) Training (include any related costs. e.g. travel expenses)	\$ <input type="text"/>	# of days: <input type="text"/>
E) Optional Hardware/Equipment (Servers, Scanners, Printers, Storage, etc.)	\$ <input type="text"/>	<input type="text"/>
F) Any additional costs related to implementation and use (if applicable)	\$ <input type="text"/>	<input type="text"/>
Total	\$ <input type="text"/>	<input type="text"/>

Subscription / Hosted Solution	Price	Comments
A) Subscription / Hosted Software License (including Year 1 maintenance)	\$ <input type="text"/>	<input type="text"/>
C) Hosting - Annual cost (if not included in above Software cost)	\$ <input type="text"/>	<input type="text"/>
C) Implementation/Professional Services	\$ <input type="text"/>	<input type="text"/>
D) Training (include any related costs. e.g. travel expenses)	\$ <input type="text"/>	# of days: <input type="text"/>
E) Optional Hardware/Equipment (if applicable)	\$ <input type="text"/>	<input type="text"/>
F) Any additional costs related to implementation and use (if applicable)	\$ <input type="text"/>	<input type="text"/>
Total	\$ <input type="text"/>	<input type="text"/>

Annual Software Maintenance Renewal	Price	Comments
-------------------------------------	-------	----------

Year 2	\$ <input type="text"/>	<input type="text"/>
Year 3	\$ <input type="text"/>	<input type="text"/>
Year 4	\$ <input type="text"/>	<input type="text"/>
Year 5	\$ <input type="text"/>	<input type="text"/>

Annual Hosting Renewal (if applicable)	Price	Comments
Year 2	\$ <input type="text"/>	<input type="text"/>
Year 3	\$ <input type="text"/>	<input type="text"/>
Year 4	\$ <input type="text"/>	<input type="text"/>
Year 5	\$ <input type="text"/>	<input type="text"/>

Annual Hardware Maintenance (if applicable)	Price	Comments
Year 2	\$ <input type="text"/>	<input type="text"/>
Year 3	\$ <input type="text"/>	<input type="text"/>
Year 4	\$ <input type="text"/>	<input type="text"/>
Year 5	\$ <input type="text"/>	<input type="text"/>

Please provide itemized list of individual pricing below:

Other Services	Price	Comments
A) Conversion	\$ <input type="text"/>	<input type="text"/>
B) Optional Professional Services (Hosting)	\$ <input type="text"/>	<input type="text"/>
C) Optional Professional Services (Custom Web or User Interface Design)	\$ <input type="text"/>	<input type="text"/>
D) Optional Professional Services (System Interfaces)	\$ <input type="text"/>	<input type="text"/>
E) Optional Hardware or Peripherals	\$ <input type="text"/>	<input type="text"/>
F) Optional Professional Services (Recommended Customizations)	\$ <input type="text"/>	<input type="text"/>

Additional Optional Modules	Price	Comments
<input type="text"/>	\$ <input type="text"/>	<input type="text"/>
<input type="text"/>	\$ <input type="text"/>	<input type="text"/>
<input type="text"/>	\$ <input type="text"/>	<input type="text"/>
<input type="text"/>	\$ <input type="text"/>	<input type="text"/>
<input type="text"/>	\$ <input type="text"/>	<input type="text"/>
<input type="text"/>	\$ <input type="text"/>	<input type="text"/>

Additional Optional Services	Price	Comments
Hourly Professional Services (outside scope of this RFP)	\$ <input type="text"/>	<input type="text"/>

Daily Training Services (outside scope of this RFP)	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	



**The City of
OKLAHOMA CITY
and its Trusts**

**ELECTRONIC PROPOSAL PACKET
ENTERPRISE RECORDS MANAGEMENT SYSTEM
TABLE OF CONTENTS**

Introduction.....	3
General Information.....	6
Terms and Conditions.....	7
Insurance Requirements.....	15
Technical Environment.....	19
Proposal Specifications, Process and Procedures	25

(Published in the Journal Record August 14, 2024)

NOTICE TO PROPOSERS

Notice is hereby given that The Oklahoma City Municipal Facilities Authority (“Contracting Entity”) will receive electronic proposals at the **OFFICE OF THE CITY CLERK, 200 North Walker Avenue, Oklahoma City, Oklahoma 73102** until 4:00:00 p.m., on the 11th day of September 2024, for the following:

**REQUEST FOR PROPOSALS (RFP-OCMFA-037)
ENTERPRISE RECORDS MANAGEMENT SYSTEM**

The Contracting Entity has partnered with Periscope (formerly BidSync) to accept proposals electronically. You are invited to submit a proposal electronically through the Periscope system to supply the professional services, products, and/or systems specified in the electronic proposal packet. The Contracting Entity does not provide access to a computer to prepare electronic proposals or electronic proposal submission. Proposers must register with Periscope at <https://prod.bidsync.com/the-city-of-oklahoma-city> in order to submit an electronic proposal. The Contracting Entity recommends potential Proposers register and become familiar with the Periscope electronic proposal process in advance of submitting a proposal. There is no charge to the Proposer for registering or submitting an electronic proposal to the Contracting Entity through Periscope. Instructions on how to get registered to propose through Periscope can be found on The City of Oklahoma City’s website at <https://www.okc.gov/departments/bidding>.

A copy of the Guidelines and Procedures for Professional Consultant Selection may be downloaded at the following website: <https://www.okc.gov/departments/finance/policies>. Proposals shall be made in accordance with this Notice to Proposers, General Instructions and Requirements for Proposers, Oklahoma Open Records Act and Confidential Information, the RFP proposal packet, and any other documents which are included in the complete electronic proposal packet. A sample Non-Discrimination Statement, Non-Collusion Affidavit, and Vendor Registration form are attached for the Proposer’s reference and will be completed prior to contract approval. By submitting a proposal, the Proposer certifies that the Proposer, and any proposed subcontractors, are in compliance with 25 O.S. § 1313 and participate in the Status Verification System. The Status Verification System is defined in 25 O.S. § 1312 and includes but is not limited to the free Employment Verification Program (E-Verify) through the Department of Homeland Security and available at www.dhs.gov/E-Verify.

The Contracting Entity reserves the right to waive formalities, irregularities, and defects in any or all proposals, except as otherwise required by law. The Contracting Entity reserves the right: to reject any or all proposals; to reject a portion of any or all proposals; to negotiate and execute or to not negotiate or execute an Agreement with any Proposer; and to solicit new or different proposals. The Contracting Entity reserves the right to negotiate and/or contract with one or more Proposers for all or a portion of any proposal or proposed professional services, products and/or systems.

Proposals timely received electronically through Periscope in the City Clerk's Office shall be forwarded to the Requesting Department for the Selection Committee to open and review. The Periscope system does not allow proposals to be submitted after the above stated date and time. There will be no exceptions to this policy.

Enterprise Records Management System

Introduction

GENERAL

The Oklahoma City Municipal Facilities Authority (“Contracting Entity”) is a Public Trust of which The City of Oklahoma City (“City”) is a beneficiary. The Contracting Entity is seeking proposals from qualified organizations to provide a comprehensive solution that meets the requirements outlined in this RFP for a Records Management system. Vendors are invited to propose solutions that address the stated problem and requirements, including leveraging platforms within our existing Technical Environment.

The Contracting Entity is seeking an organization with a proven history of success within the records management information systems industry. The Contracting Entity intends to implement a solution that aligns with open system standards and requires minimal to no custom software development to achieve the specified features and functions stated in this solicitation. Evaluation will be based on the value and suitability of the vendor’s products and services, ability to meet or exceed defined requirements, management experience, and the vendor’s overall business viability.

This Request for Proposal (“RFP”) sets forth the requirements for the new system and solicits a detailed response from firms to include functional and technical requirements, implementation services, on-going system maintenance and support, pricing, and demonstrations of the proposed solution by finalists as described in the Selection Process section. The Contracting Entity intends to award a contract for the solution, which includes training, implementation, maintenance, and associated services only; however, the firm should propose additional services necessary to meet the requirements listed in this solicitation. The Contracting Entity, at its sole option, reserves the right to purchase hardware separately. Any additional features or modules that are available may be included in the proposal as optional.

CURRENT ENVIRONMENT

Oklahoma City is the capital City in the State of Oklahoma. The City covers an area of approximately 620 square miles. The City’s population is approximately 640,000 in a metropolitan area with a combined population of over 1.3 million people. The City of Oklahoma City employs over 5,000 full and part-time employees.

Municipal records are the result of daily business conducted by City officials and employees. According to the Records Retention Manual, some records are held permanently while others are destroyed when they have met their retention. The records in the Archive are permanent or have been deemed historically valuable and are retained permanently.

Currently, the City utilizes a decentralized records management approach where the responsibility for managing records is distributed across different departments or divisions within the organization, rather than being centralized under a single authority. Each department or division is responsible for managing its own records according to established policies, procedures, and best practices dictated by the Department and the Records Retention Manual.

PROJECT OBJECTIVES

To provide the best possible service to our customers, the processes implemented with a new system need to be as simple and effective as possible. The following high-level objectives include specific primary goals, which will be considered during the evaluation process, as well as measurement indicators of post-implementation project success:

- Provides a user-friendly interface to add, search, enter and view data.
- Provide standard, custom, and ad hoc reporting, analysis, and query capabilities.
- Provide a centralized system to store all finalized versions of digital documents and media across the City’s organization.
- Has the ability to create records within the system.
- Has the ability to integrate well with other systems i.e. SharePoint, OneDrive, Shared Drives, agenda management etc. and link related records.
- Provide the ability to describe records through approved terms to record titles and names, capture and maintain metadata, and give unique identifiers on capture.
- Ability to assign access to records based on department/function (permissions).
- Can combine both electronic document management and physical records management functionality.
- Inventory management for physical records.
- Ability to apply retention periods based on current schedule and notifying when that period is met.
- Maintain metadata about destroyed records.
- Ability to identify duplicates within the system.
- Track records across their entire life cycle.

Specific system requirements defined as part of the overall objectives are listed in the Detailed System Requirements Document which must be completed as part of each submitted proposal.

PROJECT SCHEDULE

The following represents significant events and the associated proposed timetable from release of this RFP to award of contract(s):

Event	Date
RFP advertised on Periscope	Wednesday, August 14 th , 2024
Questions due by Noon	Thursday, September 5 th , 2024
Electronic Proposals due 4:00:00 p.m.	Wednesday, September 11 th , 2024
Proposer's Oral Presentations	Week of November 4 th – 8 th , 2024
Committee Recommendation	Friday, November 15 th 2024
Projected Contract Award	Tuesday, February 15 th 2025

Note: Dates beyond the Proposal due date are tentative and subject to change

PROPOSER QUALIFICATIONS

The successful system Proposer must furnish and install all applicable software and provide services related to the installation and optimization of the system, sub-systems, and other ancillary devices described by this RFP. This RFP seeks assurance of the following:

- Timely implementation
- Fault tolerant systems
- Software reliability and performance
- Operator / internal and external user friendliness
- Maintainability
- Reliability
- Long-term useful life
- Quality training for internal users and technicians
- Quality service & maintenance including timely released upgrades
- Quality system documentation and custom training materials

The successful Proposer must have demonstrated successful performance on installations of a similar nature to that requested by this RFP. Specifically, Proposers must demonstrate a history of a successfully developed and implemented systems of similar scope and size for government entities that are live in a production state.

[Rest of page intentionally left blank]

General Information

INTENT

The Contracting Entity is seeking proposals from qualified organizations for an integrated fully functional records management solution. This Request for Proposals (RFP) includes specific information to guide you in the development of your proposal for the various systems, equipment, and communications infrastructure.

SCOPE OF SYSTEMS COVERED

An Enterprise Records Management System would manage the records effectively and efficiently throughout their lifecycle, from creation to disposal. Currently, the City Clerk's Office has no centralized records management system. Currently, physical and digital records are stored in different manners in different locations. The process to retrieve these can be time consuming as there is no unified method of record keeping for these documents. The City Clerk's Office plays the role of the Records Manager, Coordinator, Analyst, Custodian, and Compliance Officer for most of the records within the City.

A system would provide the City Clerk's Office and departments with a centralized method of storing and retrieving records. Additionally, records retention policies could then be automated and applied through this system. This system would provide more efficient record retrieval, improved collaboration, risk management, compliance requirement, audit and accountability. Implementing a new system will provide an opportunity to increase operational efficiencies, streamline work processes, and facilitate data management.

Proposers are encouraged to submit cost saving solutions for purchasing, maintenance and management of these systems. Proposer will be responsible for coordination with other software and hardware vendors, the City's Information Technology Department, and other City Department representatives.

COMPLETE SYSTEM TO BE DESCRIBED

Proposals must describe, and include pricing for all required components, services and tasks required to implement a working, fully functional system. All components - whether hardware, software or services - required to make the system usable and fully operational that is not described in the proposal documents as being necessary, shall be provided at the Proposer's expense. The price listed in the proposal shall be the delivered price, including freight to and installation at the site(s) of work in Oklahoma City. Submission of a proposal shall be conclusive evidence that the Proposer has investigated and is satisfied as to the conditions to be encountered in performing the work.

[Rest of page intentionally left blank]

Terms and Conditions

CONTRACTING ENTITY

The term "Contracting Entity" as used throughout this proposal document shall mean the Oklahoma City Municipal Facilities Authority. However, should The City of Oklahoma City or a Public Trust, of which The City of Oklahoma City is Beneficiary, choose to avail itself of goods or services from the resultant agreement(s)/contract(s), the contracted vendor(s) will honor the terms and conditions, including price, of the agreement(s)/contract(s).

SCOPE OF AGREEMENT/CONTRACT

The Contracting Entity and Proposer will enter into a separate negotiated contract upon being selected. The terms provided in this section will generally be incorporated into the agreement/contract. In the event of an inconsistency between provisions of the agreement/contract and any other document, the inconsistency shall be resolved by giving precedence in the following order: (i) Agreement/Contract articles, (ii) RFP Specifications, (iii) Notice to Proposers, (iv) General Instructions and Requirements for Proposers, (v) other requirements provided by the Contracting Entity in the RFP packet, then (vi) attachments, notes, proposal, and exceptions by Proposer.

The Contracting Entity reserves the right to award the agreement/contract to a single vendor or to multiple vendors, whichever is deemed to be in best interest of the Contracting Entity.

CONSTRUCTION AND ENFORCEMENT OF THE CONTRACT

The contract shall be construed and enforced in accordance with the laws of the State of Oklahoma. In the event of ambiguity in any of the terms of the Contract, it shall not be construed for or against any party on the basis that such party did or did not author the same.

ASSIGNMENT

In as much as the contract is a personal and professional service agreement which relies upon the personal and professional integrity, financial standing and unique ability and expertise of the Proposer to provide professional and personal services to Contracting Entity, the contract will not be assignable or authorize the sublet of Proposer's obligations, rights or interests in whole or any part of the Contract without the prior written consent of the Contracting Entity.

AGREEMENT/CONTRACT PERIOD

The agreement/contract shall be for five years with the option to renew for one additional five-year period. The agreement/contract shall be in effect commencing on the date approved by the Contracting Entity.

AGREEMENT/CONTRACT RENEWAL OPTION

1. The agreement/contract is renewable for one additional five-year period at the option of the Contracting Entity. Should the Contracting Entity desire to renew the agreement/contract, a written preliminary notice will be furnished to the contractor

- prior to the expiration date of the agreement/contract. (Such preliminary notice will not be deemed to commit the Contracting Entity to renew.)
2. Should the Contracting Entity exercise this option for renewal, the agreement/contract as renewed shall be deemed to include this option provision except that the total duration of the agreement/contract, including any renewals, shall not exceed ten years.
 3. In all cases agreement/contract renewals shall be approved by the Contracting Entity's governing body, and sufficient appropriations shall have been made for the particular fiscal year for which the renewal is sought.

TIME IS OF THE ESSENCE

Both Contracting Entity and the Proposer understand that time is of the essence with respect to the contract, and the time for performance of each task shall be made part of the contract and be strictly observed and enforced. Any extensions of time shall be with the consent of the Contracting Entity. Any failure on the part of Contracting Entity to timely object to the time of performance shall not waive any right of Contracting Entity to object at a later time.

INDEPENDENT CONTRACTOR

The Proposer is, and shall remain at all times, an independent contractor with respect to activities and conduct while engaged in the performance of services for the Contracting Entity under this agreement/contract.

STOP WORK

Upon notice to the Contractor, the Project Manager, on behalf of the Contracting Entity, may issue a stop work order suspending the performance of the services under the Contract. The stop work order shall not terminate or suspend any of the required provisions of paragraph "Indemnity" or any representations, warranties or guarantees under the Contract, however, deadlines and schedules adversely impacted may be adjusted accordingly. In the event the Project Manager issues a stop work order to the Contractor, the Contracting Entity will provide a copy of such stop work order to the Contractor.

VENUE OF ACTIONS AND APPLICABLE LAW

The Contracting Entity and Contractor agree that any dispute which may arise between or among them arising out of or in connection with a contract shall be adjudicated before a court located in Oklahoma City, Oklahoma. The Contracting Entity and Proposer hereby submit to the exclusive personal jurisdiction of the courts of the State of Oklahoma located in Oklahoma City, Oklahoma, with respect to any action or legal proceeding commenced by any party to the contract. The Contracting Entity and Contractor consent to the service of process in any such action or legal proceeding by means of registered or certified mail, return receipt requested

STANDARD OF CARE

In providing the support services herein, the Contractor shall maintain during the course of the Contract, the standard of skill, diligence and professional competency commensurate with like professionals in its industry for similar services. The Contractor agrees to require

all of its consultants and sub-contractors, by terms of its contracts, to provide services at the same standard required of the Contractor.

TERMINATION

The agreement/contract will include termination for default by either party after a 30-day cure period and will include discretionary termination by the Contracting Entity upon 120-day notice to Proposer.

ESTIMATED ANNUAL REQUIRMENTS (NO GUARANTEE):

1. The quantity of any item, good, or service when shown in the price schedule as an estimate of an annual requirement is merely an estimate based on currently available information. The purchase of any such item or quantity of good or service is not guaranteed. Any offer conditioned upon a promise by the Contracting Entity to purchase a minimum or definite quantity of such an item will be rejected.
2. The Proposer agrees to furnish all quantities ordered by the Contracting Entity during the agreement/contract period.
3. The Contracting Entity agrees to place orders with the Proposer for all its requirements for those items shown in the price schedule, as awarded, except as follows:
 - a. Quantities of items needed under conditions of emergency or public exigency as approved by the Purchasing Agent.
 - b. Quantities of items obtainable from State contracts, as approved by the Purchasing Agent.
 - c. Quantities of items where federal funds are involved and other action is warranted for federal regulatory compliance purposes.
 - d. Quantities of items awarded under specific and separate agreements/contracts.
 - e. Quantities of items which otherwise are determined to be outside the general scope and intent of this agreement/contract.
4. If requirements for any awarded items do not materialize for the quantity estimated in the applicable price schedule, such failure shall not constitute grounds for equitable adjustment or additional compensation.
5. There is no obligation to purchase any items from the agreement/contract, and purchases made in future fiscal years or other contract periods are subject to future appropriations and availability of funds.

WARRANTY

The Proposer shall warrant that at the time of final system acceptance, all items furnished under any resulting contract will be free from defects in material or workmanship and will conform to the specifications and all other requirements of the contract. All Proposers will furnish with their proposal one copy of their warranty applicable to the supplies or equipment to be furnished.

As to any item, which does not conform to the warranty, the Proposer agrees that the Contracting Entity shall have the right to:

- A. Reject and return each nonconforming item to the Proposer for correction or replacement at the Proposer's expense, or
- B. Require an equitable adjustment in the contract price.

The warranty shall be in addition to any other rights of the City.

All equipment and software warranties shall start on the date of system acceptance and will be for no less than one year following final system acceptance. Please see section titled "Evaluation Criteria" for additional acceptance criteria.

CONTRACT PAYMENT METHODS

The ordering departments will utilize purchase order numbers or purchasing cards for ordering the goods and services they require as the need arises during the agreement/contract period. A firm fixed price or not-to-exceed contract is contemplated, with progress payments tied to defined milestones as mutually determined to be appropriate. A set percentage of payments for services will be retained for a 90-day stability period until Final Acceptance, as agreed upon in the contract by all parties.

The Contracting Entity shall not be held liable for any damages sustained by any contractor for delivery of goods or services awarded by agreement/contract unless accompanied by an authorized purchase order or purchasing card reference name and number. Delivery of goods or services to Contracting Entity or any Oklahoma City department or Trust without a purchase order document, purchase order number or purchasing card reference name and number given at the time the order is placed shall constitute an unauthorized purchase.

PAYMENT/INVOICE

- a. The services will be charged to the Contracting Entity on a "not to exceed" a maximum cost basis, which includes travel and all reimbursable expenses as set forth in the Contract document. As used in this section, "not to exceed" means that the selected Proposer will perform its obligations under this Agreement even if it is required to expend more than the number of hours used to determine the Contract cost and will not charge the Contracting Entity for such excess hours or expenses unless otherwise permitted under the Agreement. In no event will the cost of services exceed that set forth in the Contract documents, unless agreed upon in advance in writing authorized by representatives of both Parties through the Change Order Process outlined in the Contract documents. Services to be provided by the selected Proposer under a duly authorized Change Order which increase the costs shall be provided at rates agreed to in the Contract documents.
- b. Selected Proposer will invoice the Contracting Entity on a milestone and/or deliverables basis as specified in the Contract documents. Invoices will be sent to the Contracting Entity upon mutual agreement upon the acceptance of specified milestones and/or deliverables. The selected Proposer's personnel will maintain a log of time worked in a manner sufficient to preserve a record of hours of services performed. Each invoice will contain an invoice number and date, Purchase Order number, indicate the time period covered, log of time worked, and milestones accepted, and detailed expense reports for the period. The Contracting Entity will

pay invoices that are not the subject of good faith disputes within 30 days of receipt of the invoice.

- c. The Contracting Entity will not be liable for any charges other than those described and authorized in the Contract document. The Contracting Entity will only pay for services actually performed and for reasonable expenses actually incurred.
- d. The Contracting Entity shall withhold payment of up to 10 percent of the total services amount as retainage for a 90-day stability period after all software modules are placed into production until Final Acceptance. The selected Proposer shall be deemed to have met its obligations when entire solution has been put into production and has operated in a stable condition for ninety (90) consecutive days, as agreed upon in Contract documents and schedules.

UPGRADES AND SUBSTITUTIONS

During the contract period, if any of the optional equipment or software named in the contract is replaced in the Proposer's product line by products performing the same functions, but using improved technology, and priced the same or, lower, then the newer product may be substituted with approval of the Contracting Entity Project Manager. Said substitutions may also be noted in any subsequent contract renewal documents without necessitating a re-bid process; provided, however, that this clause shall not be construed to allow inclusion of any equipment model, product, or service that changes the scope of the intent, technical specifications, or applications described in the RFP.

INSPECTION AND ACCEPTANCE AT DESTINATION

1. Final inspection and acceptance shall be at destination. Acceptance will occur after the goods or results of the services have been inspected and when determined by designated competent staff to have met the proposal specifications. Delivery does not constitute acceptance.
2. Although source inspection by the Contracting Entity is not anticipated under the agreement/contract, the provisions of this article shall in no way be construed to limit the rights of the Contracting Entity to otherwise conduct source inspections when it deems to be appropriate.

CONTRACTING ENTITY RESPONSIBILITY

The Contracting Entity shall only provide such space, equipment and personnel to assist the Proposer as expressly set forth in the Contract. Proposals should detail the space, equipment and personnel requested from the Contracting Entity.

ADDENDA

It is the Proposer's responsibility to log into the electronic bidding system to monitor any addenda that may be issued during the process. **A Proposer's proposal will not be accepted if all addenda have not been acknowledged by the Proposer through the electronic bidding system.** If you are set up for electronic notifications through the electronic bidding system, you should receive a notification by e-mail when addenda are issued.

BRAND NAMES/EXAMPLES

The use of any brand name or trade name in the RFP is meant solely as a reference as to the design, features, and quality of the item mentioned. It should not be constructed to imply that any brand name would be given preference in the evaluation of the RFP.

COMPLIANCE WITH FEDERAL, STATE AND LOCAL LAWS

The Proposer covenants and agrees that agents and employees of Proposer will comply with all municipal, state and federal laws, rules and regulations applicable to the business to be conducted under this agreement, and that Proposer shall obtain all necessary permits, pay all license fees and taxes to comply therewith.

Where the Proposer does not agree with the Contracting Entity's standard terms and conditions, the Proposer is required to identify the specific clauses the Proposer wishes to amend or delete and suggest alternative wording. Statements such as "We comply with the following clarification" followed by an exception should be avoided. We discourage proposals which simply state that "the proposal is subject to the Proposer's standard terms and conditions", or that "the terms and conditions are subject to negotiation after award".

UNDUE INFLUENCE

Upon advertising this solicitation, no officer, employee, agent, or representative of the Proposer shall have any contact or discussion, verbal or written, with any representative of the Contracting Entity (i.e. Trust Officer, City Council member, or City staff) either directly or indirectly through others in which the Proposer seeks to influence any representative of the Contracting Entity regarding any matters pertaining to this solicitation.

Contacts by the Proposer with the Contracting Entity that do not pertain to a solicitation are exempt from this provision. Examples of these exempt contacts are:

- Private, non-business, contacts with the Contracting Entity by the Proposer's employees acting in their personal capacity
- Business contacts outside of this solicitation that the Contracting Entity may have with the Proposer
- Presentations and/or responses to inquiries initiated by the Contracting Entity
- Pre-proposal conferences
- Discussions with The IT Project Manager, buyer or departmental contact as outlined in the proposal packet

If a representative of any Proposer submitting a proposal violates the foregoing prohibition by contacting any of these parties, such contact may result in the Proposer being disqualified from the procurement process.

INDEMNITY

Proposer agrees to hold harmless, defend and indemnify the Contracting Entity from all claims for damages alleged to arise from Proposer's acts and/or omissions.

PRICES

Proposals shall be firm unless in the event of a discrepancy between unit prices and extended price, the lowest of the price quotations shall govern.

CONTRACT AMENDMENT PROCEDURES

The Contracting Entity may at any time, by Contractor request or otherwise, amend the services to be performed under the Scope of Services. The nature of these changes include, but are not limited to, additions or deletions from any services, changes to the schedule, prevention or loss of work due to inadequate facilities or technical infrastructure, or changes to key final decisions. With respect to amendments that do not materially impact the scope of either party's work effort required under the Contract, the parties will cooperate in good faith to agree upon such amendments and will not unreasonably withhold approval of such amendments as may be proposed by the other Party. If either Party causes or requests a change that impacts the scope of the Parties' work effort in the Contract, the other Party may propose an amendment to cover the additional work effort required of it. A material impact to the scope of this project shall be defined as any change that increases or decreases the cost of the project or one that requires the substantial movement of a date for delivery of any major milestone or the date for placing software modules into production.

PROPOSAL PREPARATION COSTS

All costs directly or indirectly related to preparation of a response to the RFP, including costs associated with bonding requirements, travel to Oklahoma City for any pre-award on-site visits, or any oral presentations required to supplement and/or clarify a proposal which may be required by the Contracting Entity, shall be the sole responsibility of and shall be borne by the Proposer(s). All responses to this RFP become the property of the Contracting Entity.

PERSONNEL

The Proposer agrees and understands that the Contracting Entity's Contract may be predicated, in part and among other considerations, on the utilization of the specific individual(s) and/or qualifications as identified in the Proposer's proposal. Therefore, the Proposer agrees that no substitution of such specific individuals and/or qualifications shall be made without the prior written approval of the Contracting Entity. The Proposer further agrees that any substitution made must be equal or better than the originally proposed and that the Contracting Entity approval of a substitution shall not be construed as an acceptance of the substitute's performance potential. The Contracting Entity agrees that approval of a substitution will not be unreasonably withheld.

In the Contract, the Contracting Entity will reserve the right to require substitution of any Proposer Personnel who do not perform to the necessary standards for achieving the Contract Scope of Services. Proposer will be required to provide qualified substitutions in a timely manner to accomplish milestones and deliverables.

Proposer represents that all required personnel to perform the services required under the contract will be acquired at the Proposer's expense. Such personnel shall not be employees of or have any contractual relationship with the Contracting Entity, The City of Oklahoma City, or its Trusts except as employees of the Proposer. All of the services required under the contract will be performed by the Proposer or under the Proposer's direct supervision and all personnel engaged in the work shall be fully qualified and shall be authorized to perform such services. None of the

work or services covered by the contract shall be subcontracted without the written approval of the Contracting Entity.

REPRESENTATIONS

Any representations, promises, warranties, guarantees and/or statements made by the Proposer in the proposal, during any interview or presentation, or otherwise, shall be enforceable against the selected Proposer. The City reserves the right to make audio or video tape recordings of any interview or presentation by any Proposer. Any proposal, submittal and/or recordings of any interview or presentation may at the sole option of the Contracting Entity be incorporated by reference into the contract(s) with the Proposer. All representations, promises, warranties, guarantees and statements of the parties shall survive the expiration or termination of the contract.

RIGHT TO REJECT

The Contracting Entity reserves the right to reject any or all proposals or to award the agreement/contract to the next most qualified respondent if the successful proposer does not execute an agreement/contract within 30 days after award of the proposal. Any or all proposals may be rejected in whole or in part. Selection will not be limited to fees or costs alone, but upon other factors which may be considered essential. The Contracting Entity reserves the right to waive immaterial irregularities in the submitted proposal.

CLARIFICATION

The Contracting Entity reserves the right to request clarification of information submitted and to request additional information from any or all of the respondents.

APPROVAL OF INFORMATION RELEASE

No reports, information, or data given to or prepared by the Proposer under the contract shall be made available to any individual or organization without the prior written approval of the Contracting Entity.

WITHDRAWAL OF PROPOSAL

Any proposal may be withdrawn until the date and time set above for the opening of the proposals. Any proposal not so withdrawn shall constitute an irrevocable offer, for a period of 270 days, to provide the Contracting Entity the services set forth in the attached request for proposals, or until the proposals have been approved.

PROPOSAL GUIDELINES

A copy of the City Guidelines and Procedures may be obtained from the City Clerk's Office, 200 N. Walker, 2nd Floor.

Insurance Requirements

The following insurance requirements are applicable and must be obtained prior to contract award if the proposal submitted includes on-site installation, software installation and configuration services, on-site maintenance services, or other repair services to be performed on Contracting Entity, City of Oklahoma City, or Trust property.

Insurance-Prior to approval of this contract, the PROPOSER shall obtain insurance coverage as provided below. The PROPOSER must provide, pay for, and maintain the types of insurance policies provided herein, in amounts of coverage not less than those set forth below. Certified, true and exact copies of all insurance policies required, and endorsement pages shall be provided to the Contracting Entity on a timely basis if requested by Contracting Entity staff.

All insurance must be from responsible insurance companies which are authorized to do business in the state of Oklahoma and are acceptable to the Contracting Entity. The required insurance coverage and policies shall be performable in Oklahoma City, Oklahoma, and shall be construed in accordance with the laws of Oklahoma.

Nothing in this Section shall define or limit the rights of any party to this contract under any other provision of this contract, including but not limited to any indemnification provision.

A. **Additional Insureds**: All liability policies (except professional liability and worker's compensation and employer's liability policies) shall provide that the Oklahoma City Municipal Facilities Authority, the City and its Trusts are named as additional insureds without reservation or restriction. "The City of Oklahoma City and its Trusts" shall be named as loss payees on the PROPOSER's valuable papers insurance policy for this Project.

All insurance coverage of the PROPOSER shall be primary and non-contributory to any insurance or self-insurance program carried by the Contracting Entity or The City of Oklahoma City.

All insurance policies shall include a severability of interest provision wherein claims involving any insured hereunder, except with respect to limits of insurance, interests shall be deemed separate from any and all other interest herein, and coverage shall apply as though each such interest was separately insured.

B. **Deductibles**: All policies must be fully insured with any single policy deductible not exceeding \$25,000. All deductibles must be declared on the certificate of insurance. If no deductible is declared, the PROPOSER is stating a deductible does not exist and thus a deductible is not approved or accepted. If the PROPOSER's deductible is different than declared, then the Contracting Entity will hold an equal amount from pay claims until corrected.

Self-insured retentions will not be accepted unless accompanied by a bond (financial guarantee bond) or irrevocable letter of credit guaranteeing payment of the losses, related investigations, claim administration and defense expenses not otherwise covered by the PROPOSER's self-insured retention.

- C. Policy Limits: The insurance coverage and limits required of the PROPOSER under this contract are designed to meet the minimum requirements of the Contracting Entity. Such coverage and limits are not designed as a recommended insurance program for the PROPOSER. The PROPOSER alone shall be responsible for the sufficiency of its own insurance program. Should the PROPOSER have any question concerning its exposures to loss under this contract or the possible insurance coverage needed therefore, the PROPOSER should seek professional assistance.

All policies shall be in the form of an "occurrence" insurance coverage or policy. If any insurance is written in a "claims-made" form, the PROPOSER shall also provide tail coverage that extends a minimum of two year from the expiration of this contract.

The minimum aggregate limits of such insurance policies and continuing coverage shall be:

- (1) Worker's Compensation and Employer's Liability Insurance. The PROPOSER shall provide and maintain, during the term of the contract, worker's compensation insurance as prescribed by the laws of the state of Oklahoma and employer's liability Insurance in an amount not less than One Hundred Thousand Dollars (\$100,000.00) each for all its employees employed at the site of the Project, and in case any work is subcontracted, the PROPOSER shall require the subcontractor similarly to provide worker's compensation and employer's liability insurance for all the subcontractor's employees, unless such employees are covered by the protection afforded by the PROPOSER. In the event any class of employees engaged in work performed under the contract or at the site of the Project is not protected under such insurance heretofore mentioned, the PROPOSER shall provide and shall cause each subcontractor to provide adequate insurance for the protection of the employees not otherwise protected. If the PROPOSER is exempt under the laws of the state of Oklahoma from the requirement to obtain and maintain worker's compensation insurance, then the PROPOSER must provide the Contracting Entity a copy of its Affidavit of Exempt Status from the Oklahoma Insurance Department.

- (2) Commercial General Liability Insurance. The PROPOSER shall provide and maintain commercial general liability insurance coverage sufficient to meet the maximum cumulative liability of all parties to this contract, including the Oklahoma City Municipal Facilities Authority, the City and any public trust participating in the Project, under the Governmental Tort Claims Act, 51 O.S. § 151 *et seq.*, (GTCA) and any amendment or addition thereto, as provided herein.

Property damage liability in an amount not less than Two Hundred Thousand Dollars (\$200,000.00) per claimant for loss, damage to or destruction of property, including but not limited to consequential damages arising out of a single accident or occurrence.

All other liability in an amount not less than One Hundred Seventy-Five Thousand Dollars (\$175,000.00) per claimant for claims including death, personal injury, and all other claims arising out of a single accident or occurrence.

Single occurrence or accident liability in an amount not less than One Million Dollars (\$1,000,000.00) for any number of claims arising out of a single accident or occurrence.

- (3) Automobile Liability Insurance. The PROPOSER shall provide and maintain comprehensive automobile liability insurance coverage as to the ownership, maintenance, and use of all owned, non-owned, leased or hired vehicles sufficient to meet the maximum cumulative liability of all parties to this contract, including the Oklahoma City Municipal Facilities Authority, the City and any public trust participating in the Project, under the Governmental Tort Claims Act, 51 O.S. § 151 *et seq.*, (GTCA) and any amendment or addition thereto, unless otherwise specifically and expressly provided herein.

Property damage liability in an amount not less than Two Hundred Thousand Dollars (\$200,000.00) per claimant for loss, damage to or destruction of property, including but not limited to consequential damages arising out of a single accident or occurrence.

All other liability in an amount not less than One Hundred Seventy Five Thousand Dollars (\$175,000.00) per claimant for claims including death, personal injury, and all other claims arising out of a single accident or occurrence.

Single occurrence or accident liability in an amount not less than One Million Dollars (\$1,000,000.00) for any number of claims arising out of a single accident or occurrence.

- D. Certificates: The insurance coverage and limits required must be evidenced by properly executed certificates of insurance on forms approved by the Oklahoma Insurance Commissioner. Copies of these certificates have been provided to the Purchasing Agent or their designee prior to execution of this contract and are attached hereto. The certificate(s) must be signed by the authorized representative of the insurance company(s) shown in the certificate(s). The PROPOSER must attach a copy of the power of attorney evidencing the authority of the authorized representative to execute the certificate of insurance. The certificate must include the Project or Contract number and Project or Contract description or name.

- E. Cancellation. There may be no termination, non-renewal, reduction in coverage, or modification of such insurance coverage.

The PROPOSER authorizes the Contracting Entity to confirm all information so furnished as to the PROPOSER's compliance with its bonds and insurance requirements with the PROPOSER's insurance agents, brokers, surety and insurance carriers. The lapse of any insurance policy or coverage required by this contract is a breach of this contract for which the PROPOSER shall repay and reimburse all payment made under the contract and such other damages, losses, and costs incurred by the Contracting Entity. The Contracting Entity may at its option suspend this contract until there is full compliance with this paragraph, and/or may suspend payment under this contract, and/or may cancel or terminate this contract and seek damages for the breach of this contract. The remedies in this paragraph shall not be deemed to waive or release any remedy available to the Contracting Entity. The Contracting Entity expressly reserves the right to pursue and enforce any other cause or remedy in equity or at law.

In the event of a reduction in any aggregate limit, the PROPOSER shall immediately notify the Contracting Entity and shall make reasonable efforts to have the full amount of the limits appearing on the certificate reinstated. If at any time the Contracting Entity request a written statement from the insurance company(s) as to any impairments to or reduction of the aggregate limit, the PROPOSER hereby agrees to promptly authorize and have delivered to the Contracting Entity such statement.

- F. Duration of Coverage. All insurance coverage required under this contract shall be maintained in full force and effect until completion and formal acceptance of the Project by the Contracting Entity. For PROPOSERs providing claims-made insurance coverage, such coverage must be maintained in full force and effect for a period of two (2) years after the final, formal acceptance of this Project by the Contracting Entity.

The requirements of the insurance provisions listed above shall survive the completion, expiration, cancellation or termination of this contract.

[Rest of page intentionally left blank]

Technical Environment

CURRENT TECHNICAL ENVIRONMENT

OVERVIEW

A centralized Information Technology (IT) department, in concert with departmental contacts, provides the City of Oklahoma City (The City) and its Trusts support for information systems. System standards are established and approved through a formal process. Deviation from standards **must** be approved in writing.

NETWORK ENVIRONMENT

The City of Oklahoma City network design follows the Cisco Enterprise Scalable *Core – Distribution – Access* model incorporating Cisco and Industry Best-Practices whenever possible. End devices leverage Fast Ethernet or Gigabit switch ports. Network is provisioned with multicast to support streaming video/audio that is IGMP/CGMP sparse mode compliant.

The City of Oklahoma City has implemented a TCP/IP routed environment. TCP/IP is the only protocol permitted in the routed environments. All new systems are required to utilize DNS for name resolution and may not utilize broadcast-based naming resolution. DHCP with Dynamic DNS Update provisions the majority of IP addressing for end devices.

The City of Oklahoma City utilizes next generation firewalls with an explicit denial for all non-approved traffic traversing the DMZ into the City's internal networks. Traffic emanating from the public internet is only authorized to enter into a DMZ server and not directly into the City's internal networks. The City reserves the right to decrypt and perform deep packet inspection on all traffic traversing any network zone that is under our control. The City also reserves the right to monitor and log all internet usage.

City connectivity to vendor applications that require remote connection to off-site resources is accomplished by establishing an IPSEC tunnel. Vendors that choose to leverage this facility are required to work with the City Network and Security Teams and adhere to all City requirements to accomplish this mode of transport.

The City of Oklahoma City has established a structured wiring plan that requires the use of CAT6 cabling to RJ-45 wall jacks in a modular configuration: conductors from faceplate to MDF/IDF can transport either data or voice as required with discrimination implemented in the equipment closet by appropriate patch. Legacy wiring is CAT5. All additional wiring and equipment will comply with this plan unless specific, written authorization has been given by the Information Technology Department before installation.

Networks other than the City's will not be directly connected to the City of Oklahoma City network. For remote access to the network, The City has provisioned Virtual Private Network (VPN) services. This will be the only supported method to access systems within The City network unless specific, written authorization has been given by the Information Technology Department before installation.

AUTHENTICATION REQUIREMENTS

- Our preference for authentication would be to use a SAML 2.0 SSO solution leveraging Microsoft Azure as the authentication provider.
- On premise applications could use LDAP based authentication if SAML 2.0 SSO via Microsoft Azure isn't available.

SERVER ENVIRONMENT

The City servers are housed and managed in Tier 2 data centers with backup power, secure access control, and environmental control. The City uses commodity-based, non-proprietary hardware. The architecture is redundant, scalable, and a multi-tiered server environment. The City prefers to use the most current Windows operating system with all updates applied. Server virtualization compatibility is highly preferred. The City currently uses Active Directory domain.

The City employs an aggressive patching policy for all Servers. Patches that are related to security issues start the testing process the day of release and are moved to production servers on a defined schedule. Vendors supplying applications to the City must be compatible with current and future OS patching and notify the City of any issues the current patches cause with their application within 10 business days of the operating system patches release. Any incapability with OS patching must be corrected within 30 days.

TECHNICAL PREFERENCES

GENERAL

The City desires to acquire a system that streamlines and enhances its Practice Management business processes. Those objectives can only be reached by implementing a new system that includes the following minimum attributes:

- An application that includes the functionality required by departments to conduct their business efficiently and effectively.
- An application that is made available to the user within a secure technical environment that has: availability, accessibility, flexibility, maintainability, stability, expandability, capacity, and responsiveness.

In addition to providing the functionality defined within the prior sections, the City also requires the Proposer to fully describe the technical environment envisioned for the City in order to achieve its stated objectives.

The City anticipates purchasing any additional servers, networking components, desktop systems, and associated system software through existing contracts. Proposers may include such items as alternates for consideration; however, all specifications, unit pricing, discount pricing, installation, and warranty information must be clearly provided and described.

Regardless of how the required hardware and system software is purchased, the Proposer must accept responsibility for defining the technical requirements and associated configuration required to meet the City's stated objectives.

GENERAL PREFERENCES

The City does not wish to discourage creative solutions nor stifle effective competition. Consequently, various technical architectures and system environments will be seriously

considered and evaluated. There will, however, be certain expectations and preferences that will guide the evaluation process.

NETWORKING PREFERENCES

The City's networking infrastructure is maintained and managed solely by City personnel. Proposers must take responsibility for specifying the requirements necessary for network communications as required to successfully implement the proposed system(s). To that end, the following concepts should be observed:

- The City's network configurations and components are not generally accessible to vendors. Vendors will not be allowed to monitor, configure, or add network components to the existing infrastructure without prior written permission.
- The vendor may propose additional network expansion or may instead choose to identify capacity requirements between devices to leverage existing infrastructure. Proposals for both approaches can be submitted for consideration.
- Vendors must specify bandwidth requirements between clients and servers, as well as between the various servers.
- Vendor is expected to define the required interface / connection between wireless data infrastructure and the City network. This should include, but not be limited to, explanations of client-side software requirements, supported operating systems, device options, and bandwidth requirements. Wi-Fi networks, even owned by the City, are treated as "foreign networks" and will be subject to firewall controls. Applications should be "Wi-Fi aware": capable of queuing both the server and client side of transactions.
- Vendor must specify proposed demarcation of responsibilities between the City and the vendor prior to system installation, testing, warranty, and maintenance.
- Remote vendor support of application will leverage the City maintained VPN solution. Modems are not permitted in the City network infrastructure.

SERVER/DESKTOP PREFERENCES

Proposer must specify both the minimum and recommended hardware configurations for Servers, Clients, and Network paths required to operate the application at the required service and performance levels. Proposers may assume no competing load for the purpose of the specification.

Server/Desktop preferences are as follows:

- In general, there is a preference for commodity-based, non-proprietary hardware. Any departure from this will require extensive justification.
- Architectural preference is for a redundant, scalable, multi-tiered, multi-server environment.
- Preference is for a common shared backup management, logging, and recovery environment.
- The City utilizes an enterprise grade server management platform for administration, maintenance and logging.
- Operating System preference is currently Windows Server 2019.

- Relational database management system preference is Microsoft SQL Server 2019 or higher.
- The expectation is for a high-capacity, high-speed, redundant online disk storage subsystem. We would prefer to leverage this storage system if it is economically feasible for this implementation.
- The City uses Exchange Online as its messaging and collaboration system.
- The primary desktop and laptop client is an Intel-based system, with Windows operating systems. Currently most of the clients are running 64-bit Windows 11 operating system. The City's client PCs that have been purchased over time include many different processor speeds and other hardware combinations, so Proposers must specify the minimum required client configuration. New desktops being purchased are 4.5 GHz processors, 16 GB RAM, 256GB SSD, 64-bit Windows 11 Operating System, and Microsoft Office 365. Mobile broadband in 4G or 5G may exist for some client systems.
- Ability for application packaging and distribution is highly preferred.
- Server virtualization compatibility is highly preferred and accomplished using Microsoft Hyper-V.
- SharePoint Online is our primary "intranet" and document storage solution.
- Power BI and SQL Server Reporting Services are our primary dashboard and reporting tools.

DATA INTEGRATION PREFERENCES

Software vendors should adhere to the following standards to ensure that their solutions are interoperable with other systems and provide a high level of performance and security:

- Software vendors should provide industry-standard APIs for data integration that support multiple data formats and protocols, such as REST, SOAP, OData, JSON, and XML.
- Software vendors should provide comprehensive API documentation including, but not limited to, all endpoints, query parameters, request/response format, rate limiting, authentication and authorization mechanism, error codes, and examples of how to use the API.
- Software vendors should adhere to industry-standard data modeling standards, such as Common Data Model (CDM), to ensure that the data is well-structured and can be easily integrated with other systems.
- Software vendors should follow industry-standard security protocols, such as SSL/TLS encryption, to ensure that data is transmitted securely and protected from unauthorized access.

SECURITY REQUIREMENTS FOR SaaS AND CLOUD APPLICATIONS

This City of Oklahoma has security requirements specifically targeting Software as a Service (SaaS) and cloud applications. These requirements are designed to ensure the protection of sensitive data and adherence to best security practices. Vendors must meet or exceed these standards to be considered for this project.

Data Protection and Privacy

To ensure the highest level of data protection and privacy for SaaS and cloud applications, the following measures must be implemented by the vendor:

Encryption:

- **Data at Rest:** All data at rest must be encrypted using robust encryption standards such as AES-256.
- **Data in Transit:** Data in transit must be encrypted using TLS 1.2/1.3 or equivalent protocols.
- **Data Residency:** The data must be stored and processed within the continental United States, ensuring compliance with local data residency and sovereignty laws.

Access Control and Identity Management

To manage access control and identity management effectively in SaaS and cloud applications, the vendor must adhere to the following requirements:

Authentication:

- **Multi-Factor Authentication (MFA):** MFA must be mandated for all user access to the cloud application.
- **Single Sign-On (SSO):** The solution must support SSO to integrate with existing identity management system (Azure Entra ID), such as SAML or OAuth.

Authorization:

- **Role-Based Access Control (RBAC):** RBAC must be implemented to ensure users have the minimum necessary access.
- **Least Privilege Principle:** The system must support the principle of least privilege for all users and services.

Security Monitoring and Incident Response

To ensure ongoing security and effective incident response for SaaS and cloud applications, the vendor must meet the following requirements:

Monitoring and Logging:

- **Security Information and Event Management (SIEM):** Integration with existing SIEM (Azure Sentinel) solutions for continuous monitoring is required.
- **Log Management:** Detailed logging of access and activity with tamper-evident logs is mandatory.

Two-Way Radios: Current Environment

The Oklahoma City (OKC) two-way radio environment features the advanced P25 Trunked Radio System, designed for enhanced public safety and emergency response. Key attributes include:

- **Dual-Phase Operation:** Supports both Phase 1 and Phase 2 communications.
- **Extensive Coverage:** 13 sites with linear simulcast technology ensure reliable communication across OKC and remote areas.
- **Dedicated RF Channels:** 20 channels optimized for high-demand and emergency situations.
- **Resilience:** Built to withstand EF-5 tornadoes, with diesel generators and DC power systems for extended outages.
- **Interoperability:** Communicates across 800 MHz bands for multi-agency operations.

- **Testing:** Regular computer-based drive testing ensures 99% reliability for handheld devices.
- **Capacity:** 38 simultaneous conversations supported by Phase 2 TDMA technology.
- **Active Talk Groups:** 601 groups for tactical, operational, and administrative communications.

Technical Preferences: Non-Public Safety Handheld Radios

- **Dimensions:** 5.9 x 2.4 x 1.9 inches, weight 10.9 oz.
- **Environmental Resistance:** Humidity, vibration, drop shock, IP66, and temperature range from -22°F to +140°F.
- **Frequency Range:** 700/800 MHz bands.
- **Digital Operation:** P25 protocol with AMBE+2 vocoding.
- **Battery:** Li-Ion, 3100 mAh, 10 hours life.

Public Safety Handheld Radios

- **Dimensions:** Similar to non-public safety, color: black.
- **Environmental Resistance:** Includes IP68 immersion, vibration, and temperature shock.
- **Frequency Range:** 700/800 MHz bands.
- **Digital Operation:** P25 protocol with AMBE+2 vocoding and ProVoice™.
- **Battery:** Li-Ion, 3100 mAh, 10 hours life.

Public Safety and Non-Public Safety Single Band Mobile Radios

- **Dimensions:** Standard mobile unit size with front-mount control.
- **Environmental Resistance:** IP54 protection, operational temperature from -22°F to +140°F.
- **Frequency Range:** 700/800 MHz.
- **Digital Operation:** Supports P25 Phase 1 and 2, and conventional analog modes.
- **Secure Communications:** 256 AES encryption.

Special Purpose Multi-Band Mobile Radios

- **Dimensions:** Varies for radio and control units.
- **Weight:** 5 to 7 lbs.
- **Channel Capacity:** 12,500 channels.
- **Environmental Resistance:** IP65 for control unit, IP54 for radio.
- **Frequency Range:** VHF, UHF, 700/800 MHz, 900 MHz.
- **Digital Operation:** P25 and ProVoice™ with multiple-key 256 AES encryption.

Desktop Base Station Radios

- **Standards:** Currently under development.

Dispatch Consoles

- **Processor:** Intel® Dual Core™ i7.
- **OS:** Windows® 10 Enterprise 64-bit.
- **Dimensions:** 1.75 x 16.75 x 10.5 inches.
- **Input Voltage:** 110-240 VAC.
- **External Interfaces:** Ethernet, USB, audio inputs/outputs.
- **Video:** DisplayPort connections for up to 4 monitors.
- **Storage:** Removable SSD.

Conventional Base Stations/Repeaters

- **Standards:** Currently under development.

Proposal Specifications, Process and Procedures

PROPOSAL PROCESS

PUBLISHED NOTICE: Journal Record, **Wednesday, August 14, 2024.**

The City of Oklahoma City and its Trusts have partnered with Periscope, Inc. to accept proposals electronically. You are invited to submit a proposal electronically through the Periscope system to supply the professional services, products, or systems specified in the electronic proposal packet. The City and its Trusts do not provide access to a computer to prepare electronic proposals or electronic proposal submission. Proposers must register with Periscope at <https://www.bidsync.com> in order to submit an electronic proposal. The City and its Trusts recommend potential proposers register and become familiar with the Periscope electronic proposal process in advance of submitting a proposal. There is no charge to the proposer for registering or submitting an electronic proposal to the City or its Trusts through Periscope. Instructions on how to get registered to propose through Periscope can be found on the City's website at <https://www.okc.gov/departments/bidding>.

ADDENDA:

It is the Proposer's responsibility to log into the electronic bidding system to monitor any addenda that may be issued during the process. A Proposal will not be accepted if all addenda are not acknowledged through the system. If you are set up for electronic notifications through the system, you will receive a notification by e-mail if any addenda are issued. No other statements or representations will be binding on the Contracting Entity except those in this RFP and any written addenda issued by the Contracting Entity.

SUBMISSION OF WRITTEN QUESTIONS AND REQUESTS FOR AMENDMENTS:

There is no guarantee the Contracting Entity will agree or comply with a requested amendment. Proposers may submit questions regarding the RFP through the electronic bidding system up to the time and date in the Project Schedule shown on page 4 in this document. Answers to these questions will be provided in the bidding system.

ADDITIONAL REQUIREMENTS AND INFORMATION

END-USER CONFIDENCE AND ACCEPTANCE

No system can be successfully implemented without a high degree of user confidence that the vendor can deliver on proposal promises. Additionally, departmental users must believe that systems offer needed functionality in operationally friendly formats before they commit to the time and effort required to fully utilize any system. Consequently, the Contracting Entity will be looking for proposals from stable, reputable organizations with proven products; a history of delivering what was promised (when it was promised); along with a track record of ongoing customer support and satisfaction.

PROJECT STATUS REPORTS

Proposer agrees to provide periodic reports reflecting the status of the transition project from the date the contract is signed to final acceptance. These reports shall accurately reflect all implementation steps, milestones, durations, and responsible parties. Additionally, these reports shall reflect all delays in the implementation schedule.

ADDENDA AND INTERPRETATIONS

If it becomes necessary to revise any part of this RFP, an addendum will be issued through the electronic bidding system. The City of Oklahoma City or its Trusts is not bound by any oral representation, clarifications or changes unless the same is provided to proposers in written addendum form from the Procurement Services Division.

ALTERING PROPOSALS

Proposals cannot be altered or amended after the submission deadline; however the selection committee may request a clarification or additional information from any, some or all proposers.

EXCEPTIONS/DEVIATIONS

Any exceptions to the terms and conditions, procedures, scope, type, and frequency of services and specifications, to those listed above, and any deviations shall be clearly spelled out on the proposal in writing, attached, and made a part of the proposer's proposal. Failure to do so shall be construed to mean that the proposer proposes to provide the services exactly as described, and in full compliance with all terms and conditions of the RFP.

SUBCONTRACTORS

The use of subcontractors will not relieve the vendor of primary responsibility. The proposed prices must include the full price, including work that will be done by subcontractors. The Contracting Entity will pay only the vendor that was awarded the contract. The contracted vendor must pay any subcontractors.

REQUIRED PROPOSAL SUBMISSION INSTRUCTIONS:

- **First**, electronically complete or acknowledge required forms in the electronic bidding system;
- **Second**, submit a Cover Letter (a simple letter of submittal, typically sent by proposers);
- **Third**, attach a copy of any exceptions made to the requirements of this RFP.
- **Fourth**, attach all documents as required in the Proposal Submittal Specifications, **letters A-P below**
- **DEADLINE:** The Contracting Entity will receive electronic proposals until **4:00:00 p.m. on Wednesday, September 11th, 2024**. Responses can be uploaded into the electronic bidding system in one file or in different files clearly labeling what is contained in each electronic file. Late proposals will not be accepted. No exceptions.

Note: A Proposer's proposal will not be accepted if all addenda have not been acknowledged by the Proposer through the electronic bidding system.

PROPOSAL SUBMITTAL SPECIFICATIONS

Each section below should be presented in the following order to ensure the RFP selection committee considers the same information on each proposal. The proposal itself shall be organized in the following format and informational sequence:

A. EXECUTIVE SUMMARY

Prefacing the proposal, the Proposer shall provide an Executive Summary of five pages or less, which gives a summation of the proposal in brief, concise terms.

B. BUSINESS ORGANIZATION

State the full name and address of your organization and identify the parent company if you are a subsidiary. Specify the branch office or other subordinate element that will perform, or assist in performing, work herein. Indicate whether you operate as a partnership, corporation, or individual. Include the state in which you are incorporated or licensed to operate. Provide the name, phone number, email address, and fax number for your proposal contact.

C. PROJECT MANAGEMENT STRUCTURE

Provide a general explanation and chart, which specifies project leadership and reporting responsibilities and interface with Contracting Entity project management team personnel. If the use of subcontractors is proposed, identify their placement in the primary management structure, and provide internal management description for each subcontractor.

D. PERSONNEL

Include names and qualifications of all professional personnel who will be assigned to this project. Provide all resumes.

E. PRIOR EXPERIENCE

Describe only relevant experience and individual experience for personnel who will be actively engaged in the project. Do not include corporate experience unless personnel assigned to this project actively participated. Do not include experience prior to 2014. Supply the project title, year, and reference name, present title, address, and phone number of the principal person for whom prior projects were accomplished.

Provide references, contact information and implementation dates for the last 5 government clients with a similar service scope, and size as this project. Refer to “General” and “Current Technical Environment” sections above.

F. ANTICIPATED IMPLEMENTATION WORKPLAN

Describe your technical plan for accomplishing the required work during the implementation. Include such time-related displays, graphs, and charts as necessary to show tasks, sub-tasks, milestones, and decision points related to the Project Objectives and your plan for accomplishment. Specifically indicate:

1. A description of your work program by tasks. Detail the steps you will take in proceeding from Task 1 to the final tasks.

2. The technical factors that will be considered in the section above, and the depth to which each will be treated.
3. The degree of definition provided in each technical element of your plan.
4. The points at which written, deliverable reports will be provided.
5. The progress payments you are requesting upon successful completion of milestones or tasks.
6. A statement of your compliance with all applicable rules and regulations of Federal, State, and Local governing entities. The Proposer must state compliance with terms of this Request for Proposal.

DELIVERY

Proposers shall specify their proposed delivery times for the requested goods and services in their proposal response. If a deadline is specified and no alternative is proposed, the Proposer will have agreed to meet the stated deadline.

F.O.B. DESTINATION

1. The selected proposer shall deliver each item F.O.B. Destination, Oklahoma City, Oklahoma, and to any and all points designated in the proposal specifications.
2. Inside delivery is required unless specifically and expressly stated in the proposal specifications.

COMMERCIAL PACKAGING

Preservation, packaging, packing and marking will be in accordance with Proposer's best commercial practice to provide adequate protection against shipping damage. Proposer is required to replace any goods damaged in shipping or delivery.

G. PROPOSAL ACCEPTANCE PERIOD

All proposals must include a statement that they are valid for a minimum period of 270 days subsequent to the RFP closing date.

H. IMPLEMENTATION TIMELINE

The implementation of any system of this size and complexity is a significant undertaking. Consideration must be given to the day-to-day operations of the City agencies and to the citizens, which must not be disturbed or interrupted.

A carefully planned project schedule and work breakdown structure diagram must be provided with the proposal. The project schedule shall be referenced to the projected contract award date, which is depicted in the Section titled "Project Schedule", for the purpose of the proposal. The project schedule and work breakdown structure diagram shall show tasks to be performed by both the Contracting Entity and the Proposer.

The project timeline shall include important milestones and logical breakpoints during which the Contracting Entity and Vendor shall assess the progress to date and prepare for the next phase.

The timeline should provide as much detail as possible and highlight all major milestones for each component of the project, which may include but not be limited to the following:

- Contract award.
- Install host system components.
- Install client components (as required).
- Establishing all interfaces.
- Performance of integration testing and optimization.
- Deliver system documentation.
- Data conversion.
- Training.
- System acceptance testing.
- Thirty-day stability test.
- Final system acceptance.
- Warranty period.

The first milestone of your timeline should be contract signing by Contracting Entity. All other events will be referenced in number of days from contract signing by Contracting Entity. Time is of the essence in the performance of this Contract. Installation, testing and satisfactory operation must be completed in accordance with the agreed upon contract schedule. Any known time constraints must be identified and presented as part of this timeline.

I. CUSTOMER SERVICE / TRAINING

Proposal must include description and timeline of training to be provided including onsite training. Service Level Agreements must be provided and include details on software and support hours, system up-time guarantees and responsiveness of support staff. The Contracting Entity does not anticipate utilizing a train-the-trainer methodology. Training must be conducted by the selected proposer onsite for all system users.

J. PRICING FOR SERVICES

The Contracting Entity does not anticipate requesting best and final offers. It is the Contracting Entity's intent to evaluate and score the proposed pricing submitted with your proposal. Any discounts (including time sensitive discounts based on date of contract approval), trade-ins, cost incentives, or signing bonuses you intend to extend to the Contracting Entity should be contained within your proposal. Please clearly state hourly rates for any level of personnel that could be utilized in such a contract for work. Include any expenses you consider reimbursable given a request for you to be on-site. Use the fillable form provided for pricing or reproduce it in its exact format as part of your submission.

K. MAINTENANCE OF VENDOR FURNISHED SOFTWARE/HARDWARE

The Contracting Entity requires that the Proposer maintain all Proposer-furnished software in a reliable operating condition and incorporate the latest software changes applicable to the installed system. The Proposer will describe the nature of the software maintenance coverage and program for maintaining reliable, efficient, and current software. The maintenance contract pricing shall include providing and installing any system software patches, upgrades, enhancements, etc., developed by the software manufacturer during the maintenance contract period.

The selected proposer must be able to provide and maintain compatible software and hardware that utilizes the existing technology by referring to the “Current Technical Environment.” All new hardware must meet current standards noted. In addition, all application and system configuration validation will be part of the final acceptance process. Any product that does not meet the current standards noted above will be rejected. No payment will be made for products that do not comply.

L. FINANCIAL INFORMATION

Please provide the following information about your company:

1. A copy of your company’s most recent audited financial statement
2. A copy of your firm’s 10k form

If your company is private, please provide sufficient financial information to demonstrate its financial stability.

M. AUTHORIZED NEGOTIATOR

Include name, address, and telephone number of the person(s) in your organization authorized to negotiate contract terms and render binding decisions on contract matters.

N. PROJECT GOALS

1. Firms must submit information that details how their proposed solution complies with the Contracting Entity’s minimum requirements.
2. Firms are also encouraged to submit any information that indicates how their proposed solution would provide the Contracting Entity with existing features and enhancements that **exceed** the minimum requirements as set forth in this RFP.
3. Explain how you will meet the Project Objectives as stated above.

Proposals must describe, and include pricing for all required components, hardware components (whether supplied by Proposer or Contracting Entity), services, and tasks required to implement a working, fully functional system. Any and all components - whether hardware, software or services - required to make the system usable and fully operational that is not described in the proposal documents as being necessary, shall be provided at the Proposer’s expense. The price listed in the proposal shall be the delivered price, including freight to and installation at the site(s) of work in Oklahoma City. Submission of a proposal shall be conclusive evidence that the Proposer has investigated and is satisfied as to the conditions to be encountered in performing the work.

O. DETAILED SYSTEM REQUIREMENTS DOCUMENT

Proposer must indicate their ability and to what degree their proposed solution will meet the stated requirement by completing the Detailed System Requirements document. Comments on each requirement are encouraged to enhance a proposer's solution on that specific requirement.

P. FORMS AND OTHER DOCUMENTS

The electronic bidding system will require that you acknowledge that you have reviewed the General Instructions and Open Records Act requirements document by entering your electronic signature. The Non-Discrimination Statement, Anti/Non-Collusion Affidavit and Vendor Registration Form will be completed prior to contract award.

SELECTION PROCESS

Proposal Evaluation Process

Each proposal will be independently evaluated by a selection committee. The selection committee is comprised of members from multiple City departments that will utilize this system including Finance, City Clerk's Office, Utilities, and Information Technology Departments. The committee may make its selection based on the written proposals received and conduct scripted demonstrations with some or all of the proposers. The selection committee will report the results of its evaluations and make its recommendation to the Contracting Entity. The Contracting Entity will approve the recommended proposer, a different proposer, or may decline to contract with any proposer.

Evaluation Criteria

Proposers will be evaluated for selection based on their overall responsiveness and ability to meet listed requirements of the RFP. Emphasis will be placed on the following criteria (in no particular order):

A. System Design and Technical Performance – 40 points.

- a) System Requirements
- b) Technical Requirements
- c) Interface Requirements
- d) Vendor Requirements

B. Installation, Management, Maintenance, Training, and Support Services - 25 points.

C. System Pricing For All Software, Equipment, and Services - 5 points.

This will include, but is not limited to:

- a) Software Licensing - Software pricing must include number of named/concurrent users, application and/or server pricing, etc., depending on the method you use.

- b) Professional Services - Professional services must include firm-fixed price for services at defined milestones.
- c) Software Maintenance - Software maintenance and support pricing for year one is to be calculated into the proposed initial implementation price. “Out year” maintenance and support costs must be clearly delineated for years 2-5.
- d) Training - Training must include number of students, number of days or hours of training, number of classes and topics to be covered. The Contracting Entity’s preference is using on-site facilities for training. To reduce impact on City business, duplicate training should be made available in successive sessions so multiple personnel could be trained on identical material at different times. If appropriate for the number of employees to be trained, the Contracting Entity will consider a “train-the-trainer” approach to reduce training costs.
- e) Hardware (Optional) - Pricing must be included in your proposal; however, the Contracting Entity reserves the right to purchase equipment elsewhere if it is deemed in the Contracting Entity’s best interest to do so.

D. Proposer’s Experience and Ability To Provide Proposed System – 15 points.

- a) Include the number of municipalities that currently use your system.

E. Project Implementation Schedule - 10 points.

This will include, but is not limited to a scrutiny of:

- a) Key team leaders, including project experience and length of time with the firm.
- b) Proposed schedule.

F. Proposal Quality - 5 points.

- a) Completeness and thoroughness of written response.
- b) Proposer's adherence to RFP guidelines and instructions.

The selection committee will select a short list of Proposers using the above criteria. Proposal finalists will be required to conduct on-site scripted demonstrations that fully demonstrate system capabilities as purported by their respective proposals. Proposal finalists will be required to set up and conduct the demonstrations on fully functional systems, which are representative of proposed configurations. Proposal finalists will be required to demonstrate end-to-end functionality and integration via ad hoc and scripted means. Additional technical question and answer sessions and site visits will be used in the final selection process. These demonstrations may be recorded electronically. A recommendation will then be submitted to the Contracting Entity, requesting approval to proceed with contract negotiations with the preferred Proposer.

In submitting proposals, Proposers must note exceptions in cases where, in the Proposer's opinion, the requirements are based on methods and features of a particular name brand or proposer's product. In evaluating the exceptions, the Contracting Entity will consider whether in its judgment the proposed system offers a degree of functionality and cost effectiveness which nullifies the standards on which the specifications are based. The RFP, the proposal documents, and the oral presentation will be incorporated into the contract by reference; therefore, all requirements not

specifically addressed as an exception in the proposal and subsequent contract documents will stand as contractual responsibilities of the Proposer

The prices submitted in the original proposal, subject to any modification in the negotiated contract, shall apply for the life of the contract; however, during the contract period, should the Proposer offer the same service, optional equipment, or upgrades to other agencies or the public at a lower cost due to price reductions or promotions, the Proposer shall also charge the Contracting Entity the lower price.

[Rest of page intentionally left blank]

Question and Answers for Bid #RFP-OCMFA-037 - Enterprise Records Management System

Overall Bid Questions

There are no questions associated with this bid.