

ORDINANCE 2021-02-04-0057

APPROVING A CONTRACT WITH PRIME GOVERNMENT SOLUTIONS TO PROVIDE A HIGHLY CONFIGURABLE RESIDENT CONNECTION PLATFORM TO CONSOLIDATE RESIDENT ENGAGEMENT THROUGHOUT THE CITY FOR A THREE-YEAR TERM WITH THE OPTION FOR THE CITY TO RENEW FOR TWO ADDITIONAL, ONE-YEAR PERIODS. THE INITIAL SYSTEM LICENSE / SUBSCRIPTION SERVICES AND IMPLEMENTATION COSTS OF \$506,900.00 ARE FUNDED THROUGH THE FY 2021 INFORMATION TECHNOLOGY SERVICES CAPITAL BUDGET AND ARE INCLUDED IN THE FY 2021 – FY 2026 CAPITAL IMPROVEMENT PROGRAM. OPERATIONS AND ANNUALLY RECURRING LICENSE / SUBSCRIPTION SERVICES IN THE ESTIMATED AMOUNT OF \$325,000.00 WILL BE FUNDED THROUGH VARIOUS CITY DEPARTMENT OPERATING BUDGETS AS ADOPTED THROUGH THE ANNUAL BUDGET PROCESS.

\* \* \* \* \*

**WHEREAS**, the City released a Request for Competitive Sealed Proposals (RFCSP) for a Resident Connection Platform that will increase transparency, resident engagement and access to City information through a seamless user experience; and

**WHEREAS**, ten proposals were received, of which two proposals were incomplete and deemed nonresponsive and eight proposals were evaluated; and

**WHEREAS**, staff recommends Prime Government Solutions for award of this contract; and

**WHEREAS**, approval of this ordinance will authorize a three-year contract with the option for the City to renew for two additional, one-year periods for a total estimated cost of \$1,806,900.00; and

**WHEREAS**, all expenditures will be in accordance with the applicable fiscal year's budget approved by City Council; **NOW THEREFORE:**

**BE IT ORDAINED BY THE CITY COUNCIL OF THE CITY OF SAN ANTONIO:**

**SECTION 1.** The proposal submitted by Prime Government Solutions for delivery, implementation, integration, customization and maintenance of a resident connection platform for the City for a total estimated cost of \$1,806,900.00, is hereby accepted, subject to and contingent upon the deposit of all required bonds, performance deposits, insurance certificates and endorsements. A copy of the score matrix and contract is attached hereto and incorporated herein for all purposes as **Exhibit I**.

5201040-40-80-1505  
**SECTION 2.** Payment is authorized to be encumbered and made payable to Prime Government Solutions in an amount not to exceed \$506,900.00. Payment is in support of the Public Participation Platform Project, using Fund 40099000, with the WBS Element 09-00128-04 and GL Account 5201040. Funding is provided by General Fund and is in the FY2021-FY2026 CIP Budget.


Payment is limited to the amounts budgeted in the Operating and/or Capital Budget funding sources identified. All expenditures will comply with approved operating and/or capital budgets for current and future fiscal years.

**SECTION 3.** Additional funding in the amount of \$325,000.00 for operations and annually recurring license/subscription services is contingent upon City Council approval of subsequent budgets within the term of this contract.

**SECTION 4.** The financial allocations in this ordinance are subject to approval by the Deputy Chief Financial Officer, City of San Antonio. The Deputy Chief Financial Officer may, subject to concurrence by the City Manager or designee, correct allocations to specific SAP Fund Numbers, SAP Project Definitions, SAP WBS Elements, SAP Internal Orders, SAP Fund Centers, SAP Cost Centers, SAP Functional Areas, SAP Funds Reservation Document Numbers, and SAP GL Accounts as necessary to carry out the purpose of this ordinance.

**SECTION 5.** This ordinance is effective immediately upon passage by eight or more affirmative votes; otherwise, it is effective on the tenth day after passage.


**PASSED AND APPROVED this 4<sup>th</sup> day of February, 2021.**

  
**M A Y O R**  
Ron Nirenberg

**ATTEST:**

  
\_\_\_\_\_  
Tina J. Flores, City Clerk

**APPROVED AS TO FORM:**

  
\_\_\_\_\_  
Andrew Segovia, City Attorney



# City of San Antonio

## City Council

February 04, 2021

**Item: 9**

**File Number: 21-1283**

**Enactment Number:**

**2021-02-04-0057**

Ordinance approving a contract with Prime Government Solutions to provide a highly configurable resident connection platform to consolidate resident engagement throughout the City for a three-year term with the option for the City to renew for two additional, one-year periods. The initial system license / subscription services and implementation costs of \$506,900.00 are funded through the FY 2021 Information Technology Services Capital Budget and are included in the FY 2021 - FY 2026 Capital Improvement Program. Operations and annually recurring license / subscription services in the estimated amount of \$325,000.00 will be funded through various City Department operating budgets as adopted through the annual budget process. [Ben Gorzell, Chief Financial Officer; Troy Elliott, Deputy Chief Financial Officer, Finance]

Councilmember John Courage made a motion to approve. Councilmember Adriana Rocha Garcia seconded the motion. The motion passed by the following vote:

**Aye:** 10 Nirenberg, Treviño, Andrews-Sullivan, Viagran, Rocha Garcia, Gonzales, Cabello Havrda, Sandoval, Pelaez and Courage

**Absent:** 1 Perry

LC  
02/04/21  
Item No. 9

# Exhibit I

RFCSP for Resident Connection Platform (20-048; 6100012503)  Score Summary FINAL EVALUATION October 20, 2020	Maximum Points	GCOM Software LLC 24 Madison Avenue Ext. Albany, NY 12203	Granicus, LLC 108 St. Peter St., Suite 600 St. Paul, MN 55102	Prime Government Solutions 4250 Drinkwater Boulevard, Suite 301 Scottsdale, AZ 85251	Silotech Group, Inc. 19026 Ridewood Parkway, Suite 118 San Antonio, TX 78259
A - Experience, Background, Qualifications	25	7.63	12.75	23.63	6.50
B - Proposed Plan	40	8.00	14.63	37.50	8.25
C - Price	15	1.85	9.75	10.53	2.32
D - SBEDA Prime Contract Program	20	0.00	0.00	0.00	20.00
TOTAL SCORE	100	17.48	37.13	71.66	37.07
RANK BASED ON TOTAL SCORE		4	2	1	3

**INTEGRATION AGREEMENT  
FOR  
RESIDENT CONNECTION PLATFORM**

**REQUEST FOR COMPETITIVE SEALED PROPOSAL (“RFCSP”)  
NO. 6100012503**

This Agreement is entered into by and between the **City of San Antonio**, Texas, a home-rule municipal corporation (“City”) acting by and through its Director of Finance or said Director’s designee (“Director”), pursuant to Ordinance No. \_\_\_\_\_ passed and approved on the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, and **Prime Government Solutions** (“PrimeGov”), **Rock Solid Technology, Inc.** (“Rock Solid”), and **Cityzen Solutions, Inc., DBA PublicInput.com**, (“PublicInput”) (PrimeGov, Rock Solid and PublicInput are hereinafter collectively referred to as “Contractors”). City and Contractors may be referred to herein collectively as the “Parties”.

The Parties hereto severally and collectively agree, and by the execution hereof are bound, to the mutual obligations herein contained and to the performance and accomplishment of the tasks hereinafter described.

**1.0 CONTRACT DOCUMENTS**

The terms and conditions for performance and payment of compensation for this Agreement are set forth in the following contract documents, true and correct copies of which are attached hereto and fully incorporated herein for all purposes, and shall be interpreted in the order of priority as appears below:

- a. This Integration Agreement;
- b. City’s RFCSP No. 6100012503, including all exhibits, attachments and addendums thereto (Exhibit A);
- c. Contractors’ Statement of Work (SOW) (Exhibit B);
- d. Contractors’ Proposal in response to RFCSP No. 6100012503 (Exhibit C);
- e. PrimeGov Terms and Conditions for Subscription, Deployment and Ad Hoc Professional Services (Exhibit D);
- f. Rock Solid Terms and Conditions for Subscription, Deployment and Ad Hoc Professional Services (Exhibit E); and
- g. PublicInput Terms and Conditions for Subscription and Deployment (Exhibit F).

## 2.0 TERM

- 2.1 Initial Contract Term (Years 1-3). This Agreement shall begin upon the effective date of the ordinance awarding the contract, or date specified in the award letter whichever is later. This Agreement shall terminate at the end of a three (3) year period, unless sooner terminated in accordance with the provisions of this contract.
- 2.2 Renewals (Years 4-5). At City's option, this contract may be renewed under the same terms and conditions for two (2) additional, one (1) year periods. Renewals shall be in writing and signed by the Director, without additional City Council approval, subject to and contingent upon appropriation of funding therefor.
- 2.3 Temporary Short Term Extensions. City shall have the right to extend this contract under the same terms and conditions beyond the Initial Contract Term or any Renewal thereof, on a month to month basis, not to exceed three months. Said month to month extensions shall be in writing, signed by Director, subject to and contingent upon appropriation of funding therefor.

## 3.0 COMPENSATION TO CONTRACTORS

- 3.1 License and Service Fees. City agrees to pay Contractors in accordance with RFCSP Attachment B – Pricing Schedule. **PrimeGov shall submit invoices** to City upon completion of each service, or annually for license fees, in the format specified in RFCSP Section 014 – General Terms & Conditions, which **City shall pay PrimGov** within 30 days of receipt and approval by Director.
- 3.2 Additional Functionalities, Enhancements and Professional Services. For additional functionalities, enhancements and professional services not included in the scope of this Agreement, City may directly engage the respective Contractor (PrimeGov, Rock Solid or PublicInput) using the terms and conditions of this Agreement and such work will be completed on a time and materials basis. Should City request such services, Contractor will provide a deliverables-based SOW with a stated maximum cost. Contractor shall submit invoices to City upon satisfactory completion of Acceptance Testing for the applicable additional functionality or enhancement, or upon satisfactory completion of the professional services, in a form acceptable to City, which City shall pay within 30 days of receipt and approval by Director.
- 3.3 Upon termination or expiration of this Agreement, City may, in its sole discretion, directly contract with the respective Contractor (PrimeGov, Rock Solid or PublicInput) using these agreed upon terms and conditions for additional license renewals and services. This section 3.3 shall survive the termination or expiration of this Agreement.

#### 4.0 INSURANCE

- 4.1 PublicInput represents and warrants that PublicInput is a developer and provider of Software-as-a-Service (“SaaS”) and, as such, does not utilize automobiles, personal or company-owned, while conducting its business. In addition, because the PublicInput SaaS product is hosted via cloud-based servers and implemented remotely, PublicInput does not maintain automobile insurance coverage.
- 4.2 RFCSP Section 013, Supplemental Terms & Conditions, is hereby revised to incorporate for all purposes PublicInput’s Contractor Memo dated July 1, 2020, as an affidavit of no car use in lieu of Business Automobile Liability insurance.

#### 5.0 GENERAL TERMS & CONDITIONS

- 5.1 Failure to Deliver. RFCSP Section 014, Delivery of Goods/Services, Failure to Deliver, is deleted in its entirety.
- 5.2 Testing. RFCSP Section 014, Testing, is deleted in its entirety.

#### 6.0 TERMINATION

- 6.1 Termination-Breach. Should either Party fail to fulfill in a timely and proper manner its material obligations under this contract, or violate any of the material terms of this contract, the non-breaching party shall have the right to terminate the contract with 30 days of notice unless Parties are working in good faith to cure the breach. Notice of termination shall be provided in writing, effective upon the date set forth in the notice. If Contractors fail to cure the default within the cure period, City shall have the right, without further notice, to terminate the contract in whole or in part. Such termination shall not relieve Contractors of any liability to the City for damages sustained by virtue of any breach by Contractors.
- 6.2 Termination-Notice. City may terminate this contract, in whole or in part, without cause. City shall be required to give Contractors notice **thirty (30)** days prior to the date of termination of the contract without cause. Under such termination, all fees owed for services or deliverables received and approved by City before the effective date of termination shall be considered earned.
- 6.3 Termination-Funding. If funding for the entire Agreement is not appropriated at the time this Agreement is entered into, City retains the right to terminate this Agreement, in whole or in part, at the expiration of each of City’s budget periods, and any additional contract period beyond the initial term set forth in 2.1 is subject to and contingent upon subsequent appropriation. This contract is conditioned on a best efforts attempt by City to obtain and appropriate funds for payment of any debt due by City herein.



6.4 Termination by City may be effected by Director, without further action by the San Antonio City Council.

## 7.0 NOTICE

Except where the terms of this Agreement expressly provide otherwise, any election, notice or communication required or permitted to be given under this Agreement shall be in writing and deemed to have been duly given if and when delivered personally (with receipt acknowledged), or three (3) days after depositing same in the U.S. mail, first class, with proper postage prepaid, or upon receipt if sending the same by certified mail, return receipt requested, or upon receipt when sent by a commercial courier service (such as Federal Express or DHL Worldwide Express) for expedited delivery to be confirmed in writing by such courier, at the addresses set forth below or to such other address as either party may from time to time designate in writing.

If intended for City, to:

City of San Antonio  
ITSD  
P.O. Box 839966  
San Antonio, Texas 78283-3966

If intended for Contractors, to:

Prime Government Solutions  
4250 Drinkwater Boulevard, Suite 301  
Scottsdale, Arizona 85251

With copy to:

City of San Antonio  
Finance Department, Purchasing Division  
P.O. Box 839966  
San Antonio, Texas 78283-3966

## 8.0 ENTIRE AGREEMENT

This Agreement, together with its exhibits, if any, constitutes the final and entire agreement between the parties hereto and contains all of the terms and conditions agreed upon. No other agreements, oral or otherwise, regarding the subject matter of this Agreement shall be deemed to exist or to bind the parties hereto, unless the same are in writing, dated subsequent to the date hereto, and duly executed by the parties.

[The remainder of this page is intentionally left blank.]

**EXECUTED** and **AGREED** to as of the dates indicated below. This Agreement may be executed in any number of counterparts, each of which shall be deemed an original and constitute one and the same instrument.

**CITY OF SAN ANTONIO**

**PRIME GOVERNMENT SOLUTIONS**

\_\_\_\_\_  
Name: Norbert Dziuk  
Title: Assistant Finance Director  
Date: \_\_\_\_\_

\_\_\_\_\_  
Name: Sherif Agib  
Title: Chief Executive Officer  
Date: \_\_\_\_\_

**ROCK SOLID TECHNOLOGY, INC.**

Approved as to Form:

\_\_\_\_\_  
Assistant City Attorney

\_\_\_\_\_  
Name: Rick Brown  
Title: Chief Executive Officer  
Date: \_\_\_\_\_

**CITYZEN SOLUTIONS, INC. DBA  
PUBLICINPUT.COM**

\_\_\_\_\_  
Name: Graham Stone  
Title: Vice President  
Date: \_\_\_\_\_

EXECUTED and AGREED to as of the dates indicated below. This Agreement may be executed in any number of counterparts, each of which shall be deemed an original and constitute one and the same instrument.

CITY OF SAN ANTONIO

PRIME GOVERNMENT SOLUTIONS

\_\_\_\_\_  
Name: Norbert Dziuk

Tom Spengler  
Name: Tom Spengler

Title: Assistant Finance Director

Title: Executive Chairman

Date: \_\_\_\_\_

Date: 1-26-2021

ROCK SOLID TECHNOLOGY, INC.

Approved as to Form: \_\_\_\_\_

Rick Brown  
Name: Rick Brown

Assistant City Attorney

Title: Chief Executive Officer

Date: 1-27-2021

CITYZEN SOLUTIONS, INC. DBA  
PUBLICINPE.T.COM

Graham Stone  
Name: Graham Stone

Title: Vice President

Date: 1-27-2021



## INFORMATION TECHNOLOGY SERVICES DEPARTMENT REQUEST FOR COMPETITIVE SEALED PROPOSAL

### ("RFCSP") for RESIDENT CONNECTION PLATFORM (RFCSP 20-048, 6100012503)

**Release Date: 06/29/2020**  
**Proposals Due: 09/4/2020**

**This solicitation has been identified as High-Profile.**

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#### PROHIBITED CAMPAIGN CONTRIBUTIONS

Notice Regarding Prohibition on Campaign or Officeholder Contributions for Individuals and Entities Seeking High-Profile Contracts. Under Section 2-309 of the Municipal Campaign Finance Code, the following are prohibited from making a campaign or officeholder contribution to any member of City Council, candidate for City Council or political action committee that contributes to City Council elections beginning on the \*10th business day after a contract solicitation has been released through the 30<sup>th</sup> calendar day following the approval by City Council ("blackout" period):

- (1) Any individual seeking a high-profile contract;
- (2) Any owner, officer, officer of board, and executive committee member of an entity seeking a high-profile contract, excluding board officers and executive committee members of 501 (c)(3), 501(c)(4) and 501 (c)(6) non-profit organizations not created or controlled by the City whose board service is done strictly as a volunteer with no financial compensation and no economic gain from the non-profit entity;
- (3) The legal signatory of the high-profile contract;
- (4) Any attorney, lobbyist or Contractor hired or retained to assist the individual or entity in seeking a high-profile contract;
- (5) Subcontractors hired or retained to provide services under the high-profile contract; and
- (6) Any first-degree member of the household of any person listed in (1), (2), (3) or (5) of this subsection.

A high-profile contract cannot be awarded to the individual or entity if a prohibited contribution was made by any of these individuals during the "blackout" period.

***\*For this solicitation, the first-day contributions are prohibited is Tuesday, July 14, 2020. The first day contributions may be made is the 31st day after the contract is approved at a City Council "A" Session.***

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#### RESTRICTIONS ON COMMUNICATIONS

In accordance with and as authorized by Section 2-61 of the City Code, the following restrictions on communications apply to this solicitation: Respondents are prohibited from contacting 1) City officials, as defined by §2-62 of the City Code of the City of San Antonio, regarding the RFCSP or proposal from the time the RFCSP has been released until the contract is posted for consideration as an agenda item during a meeting designated as an A session; and 2) City employees from the time the RFCSP has been released until the contract is approved at a City Council "A" session.

Restrictions extend to "thank you" letters, phone calls, emails and any contact that results in the direct or indirect discussion of the RFCSP and/or proposal submitted by Respondent.

Violation of this provision by Respondent and/or its agent may lead to disqualification of Respondent's proposal from consideration.

For additional information, see the section of this RFCSP entitled "Restrictions on Communication".

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Respondent's Proposal must contain the following documents. These forms can be found as attachments to this RFCSP or web links, as indicated.		
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### 003 BACKGROUND

This Request for Competitive Sealed Proposals ("RFCSP") is issued by the City of San Antonio ("City"). The purpose of this request is to select a vendor ("Respondent") that has a proven record of successfully delivering a highly configurable Resident Connection Platform ("solution") to other large municipalities or government agencies similar to the City. The Respondent must demonstrate that it is capable of delivering on the proposed solution. It is anticipated that the new solution will replace multiple independent systems currently in place within the City.

The City's Information Technology Services Department (ITSD) is looking at ways to consolidate resident engagement throughout the City and is looking for a Resident Connection Platform (solution). The desired platform will feature five core components:

1. Constituent Management
  - a. This component will allow Council offices to manage interactions and relationships with their constituents, City departments to improve interactions and service delivery, and for residents to manage their own profile and communication preferences.
2. Boards and Commissions
  - a. This component will provide the required functionality to manage the application process and improve the experience for both the applicants and the staff processing applications.
3. Meeting Management (City Council, Boards and Commissions)
  - a. This component seeks to improve the way City Council and, Boards and Commissions meetings are developed and managed.
4. Survey Management
  - a. This component will provide a survey functionality that can be scaled throughout City that the Government and Public Affairs Department will have access to as an administrator to better measure resident sentiment and engagement.
5. Calendar Management
  - a. This component will provide calendar functionality that can be scaled throughout the entire City so that all department calendars roll up into a single master calendar for the City.

These five components should have the ability to apply workflows within and between components and functionalities. This solution, and its components, should be licensed and provided at an enterprise level so that the City can provide access to each department as needed. This platform should align with the WCAG 2 AA accessibility guidelines. Respondents should review the user experience from previous projects and include user experience improvements at time of proposal and/or provide flexibility to the City to customize and change under the terms of this agreement to meet changing experience requirements. Some examples of this include redefining workflows and modifying appearance and layout.

City may not fund and implement all components at once but may elect to bring them online as funding, time, and resources permit, and at the discretion of City. Moreover, the City reserves the right to negotiate into the agreement deliverables to be built and through the development of a Statement of Work will have the ability to activate and deactivate features/modules/functionalities as needed. City reserves the right to award some, all, or none of these components. These components are outlined in Section 004 Scope of Service. If a respondent's solution cannot provide functionalities desired within all five components, it is expected that they partner with another entity in order to provide a complete response. Should a respondent elect to subcontract any of the components, then must ensure a seamless integration of components as the Prime.

### 004 SCOPE OF SERVICE

The successful respondent will provide a comprehensive Resident Connection Platform solution that addresses all five core components. The solution must integrate with the City's Lagan 311 Case Management Platform, Office 365 and must be ready to integrate with a variety of other data sources, such as Windows 10, Accela, SAP, social media platforms, payment systems and social media management platforms. Respondent's scope should make considerations for: measuring success of the platform; measuring sentiment and satisfaction; how users would access the platform with a mobile device; providing a Spanish version at minimum; and accessing the platform by those with disabilities. The requirements traceability matrix (RTM) provides more specific information around the five core components, and respondents are expected to adhere to those needs. Summary information on the core components is as follows:

1. Constituent Management:

The Mayor, City Manager and City Council (MCC) offices are requesting a system allowing them to document incoming calls, emails, walk-in interactions and US Postal mail from constituents. This system would allow staff to collect requests for service, contact information and project correspondence in a centralized location for ease of use and retention purposes and utilize the data in the future to improve communication with constituents.

The objective is an improved resident relationship and accountability to ensure council aids and council staff members follow through on requests from constituents. This system will allow for better and more reliable constituent relationship delivery. It is anticipated that this solution will also improve data integrity by providing a centralized repository to house historical requests while tracking current request statuses. This will give staff tools to improve accuracy and efficiency with integrations with the systems utilized by 311, communication solutions, event management solutions, and survey solutions.

Within the scope of this project is the implementation, support and training for a new constituent relationship management solution. This solution will track constituent contact information as well as requests for service to help elected officials have profiled information and ensure requests are completed in a timely manner. Integration with the City's Lagan 311 Case Management platform and MS Exchange will be a requirement for any solution. Integrations with communication solutions, calendar solutions, and survey solutions will also be required. The solution should also have the capability to import data from other sources and export contact information.

The City's Government and Public Affairs Department (GPA) and ITSD must have access for reporting and communication needs as an administrator. GPA is responsible for resident engagement throughout the city. This responsibility takes shape in several ways including town hall meetings, administration of surveys, citizens-to-be-heard and social media efforts. An important aspect to resident engagement is marketing communication. Throughout the City departments there are various methods of reaching residents via email. Some departments keep email lists in excel and others use solutions like Constant Contact or Mail Chimp.

Because there is no centralized email marketing system it is difficult for GPA to reach residents in an effective manner. GPA is limited to the contacts they have acquired in their operations and to requesting contact information from departments when needed. The result of this is an inefficient and ineffective method of email communication and marketing with residents. GPA needs an enterprise level marketing communications system to improve efforts in this area.

This component will also give City departments the ability to improve service delivery by being able to understand their residents better and connect in more effective ways.

Residents will be able to decide how they want to interact with the City by managing their own profile and setting preferences.

## 2. Boards and Commissions:

The Office of the City Clerk (OCC) is responsible for managing all boards and commissions for the City Council. Currently there are more than 85 boards and commissions. OCC receives over 1,400 applications per year. Currently, applicants are unable to submit applications from a mobile device.

These appointments serve and support a variety of City of San Antonio services and many departments. For example, there is an Animal Care Services Advisory Board that provides review and recommendations to the department and there is an Airport Advisory Commission that provides advice to the Aviation Director on policies affecting the City's airport and air transportation initiatives.

A boards and commissions system should be easy to use and find by applicants, and by the Office of the City Clerk, Office of the City Attorney, and Mayor and Council. Automation and workflow should be included as well as customizable reporting. OCC should be able to easily update and modify the application questions, edit and post new boards, and easily create application packets.

## 3. Meeting Management:

The City of San Antonio (COSA) needs to be able to build and publish agendas for City Council Meetings as well as for Boards and Commissions. The current process is very prescriptive (see **Exhibit 12 City Administrative Directive 1.73 - Scheduling Items for City Council** Consideration for reference). Any solution will need to accommodate COSA processes in addition to being redefined as processes change. This building and posting functionality need to include automation and workflow. Additionally, OCC needs to be able to use these agendas to run and manage these meetings which may include capturing votes and meeting minutes to be published Online for public view. This aspect will also need to support live streaming and archival of video recordings. Lastly, our elected officials will need to be able to interact with

these meetings from a mobile device, tablet, or computer and be compatible with Windows and iOS devices. This interaction should include the ability to cast a vote, request-to-speak, and to view item-related materials.

#### 4. Survey Management:

There is no unified survey management throughout the City. Each department administers their own surveys through various solutions like Survey Monkey. This approach does not maximize potential respondents. With an enterprise solution, departments will still be able to administer their own surveys, but they will gain access to additional prospective respondents. GPA will have the ability to reach more respondents with citywide surveys as well as better measure and incorporate resident feedback through surveys.

#### 5. Calendar Management:

There is no master calendar within the City. Residents must separately view the event calendars of each department. This creates a potential schedule conflict where a resident may want to go to two events, but they are scheduled at the same time because the departments may not have been aware of another event that is scheduled at the same time.

The City will evaluate proposals capable of satisfying the technical, functional, and business requirements as described in this request. The proposed solution must account for all software, professional services, change management and training required to implement and support the solution.

#### **Price Schedule**

Respondent shall include pricing to include all associated integration, implementation and related costs per module. Should the City elect to add or delete a module, the associated costs to do so will be defined. Respondent shall also provide a cost list for any additional integrations that may be required to integrate with other City systems. Per hour costs are permissible for additional integrations. Pricing shall be evaluated against total module cost(s). Per hour costs will not factor into evaluation of price.

#### **Requirements Traceability Matrix ("RTM")**

The detailed requirements provided for vendor responses are in **Exhibit 2 – Requirements Traceability Matrix**. It is important for responding vendors to indicate in the requirements traceability matrix whether or not the requirement being requested can be met by the out-of-the-box system solution or if the requirement requires customization. These requirements are broken out by the five core areas.

#### **COSA Statement of Work (SOW)**

A copy of the City's **SOW standards** shown as **Exhibit 3** with this solicitation shall serve as a guideline for the successful respondent to create the SOW with the City's project and contract management team.

#### **COSA Technology Standards**

The City of San Antonio Information Technology Services Department ("ITSD") **Technology Standards** are being included as **Exhibit 4**. The successful respondent will propose a solution that is compliant with those standards. The City requires a standard project management process.

#### **Project Management-Testing and Quality Assurance**

The City of San Antonio requires comprehensive testing rigor at appropriate milestones during system delivery. This includes unit testing, integration testing, system testing and user acceptance testing. The vendor must include their testing strategy that will be followed for the proposed system. The successful respondent will be required to follow a rigorous Software Development Lifecycle ("SDLC") for system deployment which will include planning, design, development, implementation, system testing, user acceptance testing and deployment. Required deliverables will include functional requirements specification, system design specification, and system and user acceptance test plan and test scripts. System testing completion and certification is required in order to enter user acceptance testing. A training plan, change management plan and data migration is also required.



Respondent shall describe their testing strategy by stating various types of testing that will be performed to test and validate the functionality of the implemented solution against the requirements including their defect tracking process in their proposal response.

The respondent is responsible for the test planning, test case development, test environment setup, test data, test automation (if required), test execution and support, defect management, test metrics, and test closure. At a minimum, the respondent is responsible for unit testing, integration testing and end to end system testing. The respondent will support user acceptance testing and any other applicable tests such as data conversion, performance and regression. All tests and testing criteria are subject to approval by the City of San Antonio's (COSA) Government and Public Affairs and Information Technology Services Departments.

City of San Antonio (COSA) creates and conducts User Acceptance Testing (UAT) in coordination with the vendors' technical support staff and end users. The vendor should provide any test scripts used for UAT, for COSA and ITSD to review and customize. Respondents should state in their response if a different UAT approach should be considered based on the product solution being proposed.

System testing completion and certification is a prerequisite for entering user acceptance testing.

The following are the minimum required deliverables for the implemented solution:

- System test plan
  - o System test scripts/cases
  - o System test summary report and completion certification
- User acceptance test plan
  - o User acceptance test scripts/cases
  - o User acceptance test summary report and completion certification
- Defect and resolution logs

Deliverable	Description/Content – Deliverable Expectation
Test Plan	<p>Should contain the following content with appropriate level of detail:</p> <ul style="list-style-type: none"> <li>• Test Plan Name</li> <li>• Purpose/Objective</li> <li>• Scope/Test Items</li> <li>• Risks and Assumptions</li> <li>• Features to be tested</li> <li>• Features excluded from testing</li> <li>• Testing Approach</li> <li>• Roles and Responsibilities</li> <li>• Resource Requirements</li> <li>• Test Pass and Fail Criteria</li> <li>• Entry and Exit Criteria</li> <li>• Resumption/Suspension Criteria</li> <li>• Defect Priority and Severity Definitions</li> <li>• Test Results and Deliverables</li> <li>• Test Environment and Data</li> <li>• Training, Staffing and Tools</li> <li>• Testing Schedule</li> <li>• Planning for Risks and Contingency Plans</li> <li>• Approvals</li> </ul> <p>System Test Plan – Will cover the scope for System testing            UAT Test plan – Will cover the scope for UAT Testing.</p>

<p>Test Scripts/Cases (System Test Scripts UAT Test Scripts)</p>	<p>Should contain the following content with appropriate level of detail:</p> <ul style="list-style-type: none"> <li>• Test Case ID or Name</li> <li>• Test Case Summary</li> <li>• Test Case Prerequisites</li> <li>• Test procedure/step by step procedure to execute the test</li> <li>• Test Data</li> <li>• Expected Result</li> <li>• Actual Result</li> <li>• Test Status</li> <li>• Created by/author of the test case</li> <li>• Date of creation/test case creation date</li> <li>• Executed by/person who executed the test</li> <li>• Test environment</li> <li>• Traceability of requirements to test cases</li> <li>• Remarks</li> </ul>
<p>Test report and completion certification</p>	<p>Should contain the following content with appropriate level of detail:</p> <ul style="list-style-type: none"> <li>• Brief description of the testing process employed</li> <li>• Summarize testing activities</li> <li>• Test functions performed and test coverage</li> <li>• Test cases summary results</li> <li>• Test defects and resolution summary results</li> <li>• Summarize the overall test results</li> </ul> <p>System test completion certificate: The readiness certification will be the Respondent's statement that a system end to end testing is complete and has passed all internal testing and is now ready for User Acceptance Testing. A walkthrough or demo of the core business processes in COSA test environment.</p> <p>User acceptance completion certificate: This readiness certification will be the Respondent's statement that the system has passed testing and validation of the functionality of the implemented solution against the requirements and all User Acceptance Testing is completed successfully.</p>
<p>Defect and Resolution Log</p>	<p>Defect and Resolution Log at a minimum should contain the following content with appropriate level of details:</p> <ul style="list-style-type: none"> <li>• Recording</li> <li>• Analyzing</li> <li>• Tracking</li> <li>• Resolution</li> <li>• Closing of the defects</li> </ul>

**Accessibility**

The City of San Antonio uses the Web Content Accessibility Guidelines (WCAG 2.0 AA) developed through the World Wide Web Consortium (W3C) Web Accessibility Initiative (WAI) which provides web accessibility guidelines, technical specifications, and educational resources to help make the web accessible to all. Respondents shall use the WCAG 2.0 AA for any content that is web-based.

**Documentation and Knowledge Transfer**

The City requires knowledge transfer sessions during the implementation phase to provide assigned City system administrators the ability to support the system upon completion of the selected vendor engagement. All documentation will be provided to the City as required deliverables.

**Training**

The City of San Antonio prefers that the vendor develop and provide custom training specific to end users. The training should cover the use of the systems and how these systems support the business processes. The City requests a response for best practices training and approach for the scope of this project request.

**Warranty Period**

A warranty period shall be included in the project plan that provides post go live assistance to the City as part of the vendor engagement and should be addressed as part of this request.

**Other Requirements**

The proposed system shall adhere and conform to the following City ITSD Administrative Directives (AD):

- Exhibit 5 -Acceptable Use of Information Technology (AD 7.4A)
- Exhibit 6 - Access Control (AD 7.8d)
- Exhibit 7 - COSA Data Security (AD 7.3a)
- Exhibit 8 - Non-City Employee Provisioning Guide (v1.4, 12-8-2018)
- Exhibit 9 - Reimbursement Reports (GR 1050-58 Rev. 2014-9)
- Exhibit 10 - COSA Testing Policy (v1.5, 5-16-19)
- Exhibit 11 - COSA Testing Strategy (v1)

## 005 SCHEDULE OF EVENTS

Following is a list of projected dates/times with respect to this RFCSP:

RFCSP Release	Monday, 06/29/2020
Pre-Submittal Conference	Friday, 07/10/2020 at 9:30 AM. Central Time <b>by Webex only</b>
Final Questions Accepted	Monday, 08/10/2020 at 2:00 PM. Central Time
Proposal Due	Friday, 09/04/2020 at 2:00 PM. Central Time

## 006 PRE-SUBMITTAL CONFERENCE (Q&A SESSION)

A Pre-Submittal Conference (Q&A Session) will be held **by Webex only** conferencing at **9:30 a.m., Central Time, on Friday, July 10, 2020. To join the meeting, see information below.** Respondents are encouraged to prepare and submit their questions in writing 3 calendar days in advance of the Pre-Submittal Conference in order to expedite the proceedings. A copy of the agenda for the Pre-submittal conference is shown as Exhibit 13. A presentation by the Small Business Economic Development Advocacy (SBEDA) Office will be given during the conference, and their presentation is shown as Exhibit 14. Pre-Submittal Conference participation is optional, but highly encouraged.

### Join by phone

Tap to call in from a mobile device (attendees only)

+1-415-655-0001 US Toll

+1-904-900-2303 United States Toll (Jacksonville)

### Join from a video system or application

Dial 1338125270@sanantonio.webex.com

You can also dial 173.243.2.68 and enter your meeting number.

### Join using Microsoft Lync or Microsoft Skype for Business

Dial 133 812 5270.sanantonio@lync.webex.com

**Conference Bridge: Toll Free Dial-In Number: 1-855-850-2672**

**Meeting number (access code): 133 812 5270**

**Meeting Password: eB4FITV48jS**

Any oral response given at the Pre-Submittal Conference that is not confirmed in writing and posted with this solicitation shall not be official or binding on the City. Respondents are encouraged to resubmit their questions in writing, to the City Staff person identified in the Restrictions on Communication section, after the conclusion of the Pre-Submittal Conference.

## 007 PROPOSAL REQUIREMENTS AND EVALUATION

**SUBMISSION.** Respondent's Proposal shall include the following items in the following sequence, noted with the appropriate heading as indicated below. If Respondent is proposing as a team or joint venture, provide the same information for each member of the team or joint venture.

Respondent shall submit one (1) **COMPLETE ELECTRONIC COPY** of your proposal through the San Antonio eProcurement System (SAePS). **ONLY ELECTRONIC SUBMISSIONS WILL BE ACCEPTED.**

**Respondent shall limit information regarding the Small Business Economic Development Advocacy Program (and associated certifications for any joint venturers or sub-contractors) and any reference to the Respondent's proposed price or revenue to the respective section designated for this information. PLACING PROGRAM PARTICIPATION OR PRICE/REVENUE INFORMATION IN OTHER SECTIONS OF A RESPONSE TO THIS RFCSP MAY RESULT IN THE RESPONDENT'S PROPOSAL BEING DEEMED NON-RESPONSIVE AND THEREFORE DISQUALIFIED FROM CONSIDERATION.**

When submitting electronically through City's portal, scan and upload these documents with your proposal. Each of the items listed below must be uploaded as a separate attachment, labeled with the heading indicated below.

### TABLE OF CONTENTS

EXECUTIVE SUMMARY. The summary shall include a statement of the work to be accomplished, how Respondent proposes to accomplish and perform each specific service and unique problems perceived by Respondent and their solutions.

GENERAL INFORMATION FORM. Use the Form found in this RFCSP as Attachment A, Part One.

EXPERIENCE, BACKGROUND AND QUALIFICATIONS. Use the Form found in this RFCSP as Attachment A, Part Two.

PROPOSED PLAN. Prepare and submit the Proposal based on the requirements stated in the RFCSP and include as Attachment A, Part Three.

PRICE SCHEDULE. Use the Pricing Schedule found in this RFCSP as Attachment B.

\*CONTRACTS DISCLOSURE FORM. Use the Form in RFCSP Attachment C which is posted separately or Respondent may download a copy at:

<http://www.sanantonio.gov/Ethics/ForCompliance/Vendors-And-Conflict-of-Interest-Reports>

Instructions for completing the Contracts Disclosure form:

1. Download form and complete all fields. All fields must be completed prior to submitting the form.
2. All respondents must include the following information in the required Contracts Disclosure Form at the time the original proposal is submitted:
  - a. names of the agency board members,
  - b. list of positions they hold as board members, and
  - c. names and titles of officers of the organization.
3. Click on the "Print" button and place the copy in your proposal as indicated in the Proposal Checklist.

LITIGATION DISCLOSURE FORM. Complete and submit the Litigation Disclosure Form, found in this RFCSP as Attachment D. If Respondent is proposing as a team or joint venture, then all persons or entities who will be parties to the contract (if awarded) shall complete and return this form.

PROOF OF INSURABILITY. Submit a letter from insurance provider stating provider's commitment to insure the Respondent for the types of coverages and at the levels specified in this RFCSP if awarded a contract in response to this RFCSP. Respondent shall also submit a copy of their its current insurance certificate.

FINANCIAL INFORMATION. Submit a recent copy of a Dun and Bradstreet financial report, or other credit report, on Respondent and its partners, affiliates and subcontractors, if any.

VETERAN-OWNED SMALL BUSINESS PREFERENCE PROGRAM (VOSBPP). Pursuant to Ordinance No. 2013-12-05-0864, all solicitations issued by the City are subject to tracking of Veteran Owned Small Business (VOSB) participation. For more information on the program, refer to the Veteran-Owned Small Business Program Tracking Form attached to this solicitation. Complete, sign and submit the Veteran-Owned Small Business Program Tracking Form found in this RFCSP as Attachment E.

CERTIFICATE OF INTERESTED PARTIES (Form 1295).

Texas Government Code §2252.908, and the rules issued by the Texas Ethics Commission found in Title 1, Sections 46.1, 46.3 and 46.5 of the Texas Administrative Code, require a business entity to submit a completed Form 1295 to the City before the City may enter into a contract with that business entity.

Form 1295 must be completed online. It is available from the Texas Ethics Commission by accessing the following web address: [https://www.ethics.state.tx.us/whatsnew/elf\\_info\\_form1295.htm](https://www.ethics.state.tx.us/whatsnew/elf_info_form1295.htm).

**Print your completed Form 1295 showing the Certification Number and Date Filed in the Certification of Filing box at the upper right corner. Sign Form 1295 in front of a notary and submit it with your response to this solicitation as Attachment F. Where requested to provide the name of the public entity with whom you are contracting (Box 2 of the form), insert "City of San Antonio". Where requested to provide the contract number (Box 3 of the form), provide the solicitation number shown on the cover page of this solicitation (e.g. IFB 6100001234, RFO 6100001234 or RFCSP 6100001234).**

The following definitions found in the statute and Texas Ethics Commission rules may be helpful in completing Form 1295.

"Business entity" includes an entity through which business is conducted with a governmental entity or state agency, regardless of whether the entity is a for-profit or nonprofit entity. The term does not include a governmental entity or state agency. (NOTE: The City of San Antonio should never be listed as the "Business entity.")

"Controlling interest" means: (1) an ownership interest or participating interest in a business entity by virtue of units, percentage, shares, stock, or otherwise that exceeds 10 percent; (2) membership on the board of directors or other governing body of a business entity of which the board or other governing body is composed of not more than 10 members; or (3) service as an officer of a business entity that has four or fewer officers, or service as one of the four officers most highly compensated by a business entity that has more than four officers. Subsection (3) of this section does not apply to an officer of a publicly held business entity or its wholly owned subsidiaries.

"Interested party" means: (1) a person who has a controlling interest in a business entity with whom a governmental entity or state agency contracts; or (2) an intermediary.

"Intermediary," for purposes of this rule, means, a person who actively participates in the facilitation of the contract or negotiating the contract, including a broker, adviser, attorney, or representative of or agent for the business entity who:

- (1) receives compensation from the business entity for the person's participation;
- (2) communicates directly with the governmental entity or state agency on behalf of the business entity regarding the contract; and
- (3) is not an employee of the business entity or of an entity with a controlling interest in the business entity.

Publicly traded business entities, including their wholly owned subsidiaries, are exempt from this requirement and are not required to submit Form 1295.

SIGNATURE PAGE. Respondent must complete, sign and submit the Signature Page found in this RFCSP as Attachment G. The Signature Page must be signed by a person, or persons, authorized to bind the entity, or entities, submitting the proposal. Proposals signed by a person other than an officer of a corporate respondent or partner of partnership respondent shall be accompanied by evidence of authority.

SUBCONTRACTOR/SUPPLIER UTILIZATION PLAN (SUP). Complete and submit the SUP found in this RFCSP as Attachment H.

PROPOSAL CHECKLIST. Complete and submit the Proposal Checklist found in this RFCSP as Attachment I.

ADDENDA. Sign and submit addenda, if required, as indicated by a signature line for the Respondent on the addenda.

Respondent is expected to examine this RFCSP carefully, understand the terms and conditions for providing the services listed herein and respond completely. **FAILURE TO COMPLETE AND PROVIDE ANY OF THESE PROPOSAL REQUIREMENTS MAY RESULT IN THE RESPONDENT'S PROPOSAL BEING DEEMED NON-RESPONSIVE AND THEREFORE DISQUALIFIED FROM CONSIDERATION.**

EVALUATION CRITERIA. City will conduct a comprehensive, fair and impartial evaluation of all submissions received in response to this RFCSP. City may appoint a selection committee to perform the evaluation. Each submission will be analyzed to determine overall responsiveness and qualifications under this RFCSP. Criteria to be evaluated will include the items listed below. The selection committee may select all, some or none of the respondents who are judged to be reasonably qualified for award of the contract for interviews. The City shall conduct interviews within a week of conducting a preliminary evaluation meeting. Selection for interviews will be based on initial scoring, prior to interviewing. Interviews are not an opportunity to change a submission. Respondents interviewed shall be re-scored based upon the same criteria. City may also request information from respondents at any time prior to final approval of a selected respondent or seek best and final offers from respondents deemed reasonably qualified for award.

- A. Experience, Background, Qualifications (25 points)
- B. Proposed Plan (40 points)
- C. Price (15 points)
- D. Small Business Economic Development Advocacy Plan (20 points)

**SBE Prime Contract Program – 10 pts.**

**Certified SBE firms (see Small Business Enterprise definition) headquartered or having a Significant Business Presence within the San Antonio Metropolitan Statistical Area responding to this solicitation as Prime CONTRACTORS proposing at least 51% SBE participation (Prime and/or Subcontractor) will receive ten 10 evaluation criteria points, and**

**M/WBE Prime Contract Program – 10 pts.**

**Certified M/WBE firms (see Minority/Women Business Enterprise definition) headquartered or having a Significant Business Presence within the San Antonio Metropolitan Statistical Area responding to this solicitation as Prime CONTRACTORS proposing at least 51% M/WBE participation (Prime and/or Subcontractor) will receive ten 10 evaluation criteria points.**

**No evaluation criteria points will be awarded to non-SBE or non-M/WBE Prime CONTRACTORS through subcontracting to certified SBE or M/WBE firms.**

#### **008 SUBMISSION OF PROPOSALS**

Proposals must be submitted electronically through the San Antonio eProcurement System (SAePS) portal. **Respondent shall submit one (1) COMPLETE ELECTRONIC COPY** of your proposal. **ONLY ELECTRONIC SUBMISSIONS WILL BE ACCEPTED.**

Proposals must be received no later than **2:00 P.M., Central Time, on September 4, 2020** at the address below. Any proposal or modification received after this time shall not be considered. Respondents should note that submission through the portal **MUST** be completed in a timely manner. Therefore, Respondents should strive for early submission to avoid any issues or cause delay in uploading proposal responses as RfX **WILL** close at due date and time. **No exceptions.**

Submission of Electronic Proposals. Submit one (1) **COMPLETE** proposal electronically by the due date provided on the Cover Page. All times stated herein are Central Time. Any proposal or modification received after the time and date stated on the Cover Page shall be rejected. All forms in this solicitation which require a signature must have a signature affixed



thereto, either by manually signing the document, prior to scanning it and uploading it with your submission, or affixing it electronically.

Electronic Proposal Equals Original. City and Vendor each agree that this transaction may be conducted by electronic means, as authorized by Chapter 322, Texas Business & Commerce Code, known as the Electronic Transactions Act.

Proposal Format. Each proposal shall be typewritten, single spaced and submitted on 8 ½" x 11" page layout. Unnecessarily elaborate brochures, artwork, bindings, visual aids, expensive paper or other materials beyond that sufficient to present a complete and effective submission are not required. Font size shall be no less than 12-point type. All pages shall be numbered. Margins shall be no less than 1" around the perimeter of each page. Websites, or URLs shall not be submitted in lieu of the electronic submission through City's portal. **ELECTRONIC** proposals must include **ALL** sections and attachments in the sequence listed in the RFCSP Section 007, Proposal Requirements, and each section and attachment must be indexed as in the Table of Contents page. For electronic submissions, each separate section should be attached as a separate file.

**Failure to meet the above conditions may result in disqualification of the proposal or may negatively affect scoring.**

Modified Proposals. For electronic proposals, a modified proposal will automatically replace a prior proposal submission.

City is not responsible for lost or misdirected proposals or modifications.

#### Forms Requiring Signatures.

Signature Page. For electronic proposals, Respondent's electronic submission, with accompanying affirmations, constitutes a binding signature for all purposes.

All Other Documents. All other forms in this solicitation which require a signature must have a signature affixed thereto by manually signing the document. If submitting, electronically, sign the document prior to scanning it and uploading it with your submission.

Respondents are cautioned that they are responsible for the security of their log- on ID and password, since unauthorized use could result in Respondent's being held liable for the submission.

Certified Vendor Registration Form. If Respondent has not completed City's Certified Vendor Registration (CVR) Form, Respondent is required to do so prior to the due date for submission of proposals. The CVR form may be accessed at: <http://www.sanantonio.gov/purchasing/>. Respondents must identify the correct name of the entity that will be providing the goods and/or services under the contract. No nicknames, abbreviations (unless part of the legal title), shortened, or short hand names will be accepted in place of the full, true, and correct legal name of the entity.

Correct Legal Name. Respondents who submit proposals to this RFCSP shall correctly state the true and correct name of the individual, proprietorship, corporation, and /or partnership (clearly identifying the responsible general partner and all other partners who would be associated with the contract, if any). No nicknames, abbreviations (unless part of the legal title), shortened or short-hand, or local "handles" will be accepted in lieu of the full, true, and correct legal name of the entity. These names shall comport exactly with the corporate and franchise records of the Texas Secretary of State and Texas Comptroller of Public Accounts. Individuals and proprietorships, if operating under other than an individual name, shall match with exact Assumed Name filings. Corporate Respondents and limited liability company Respondents shall include the 11-digit Comptroller's Taxpayer Number on the Respondent Questionnaire form found in this RFCSP as Attachment A, Part 1.

If Respondent is found to have incorrectly or incompletely stated the name of the entity that will provide goods and/or services, the proposal may be rejected.

Statutory Requirements. In order to comply with State law, respondents must submit proposals on the same material terms and conditions. Material variances or exceptions to the following provisions and exhibits by Respondent and/or their agent will lead to automatic disqualification of Respondent's proposal from consideration.

#### **Sections:**

Venue, Jurisdiction and Arbitration  
Indemnification  
Insurance Requirements

Firm Offer. All provisions in Respondent's proposal, including any estimated or projected costs, shall remain valid for one-hundred and eighty days (180) following the deadline date for submissions or, if a proposal is accepted, throughout the entire term of the contract.

#### Travel and Related Expenses.

City of San Antonio (City) Administrative Directive (AD) 8.31 establishes uniform procedures for the processing of requests for travel authorization, advances and reimbursements, identifies travel expenses eligible for payment and establishes proper accounting for all travel-related expenses for City.

Travel expense reimbursement may include personal vehicle mileage or commercial coach transportation, hotel accommodations, parking and meals; provided, however, the amount of reimbursement by City shall not exceed the amounts authorized by the current GSA Travel Regulations per diem. <http://www.gsa.gov/portal/category/100120>

Travel time may not be included as part of the amounts payable by Customer for any services rendered under the Contract. Air transportation shall be booked at the lowest available fare available at the time. Anticipated travel expenses must be pre-approved in writing by City.

The City has provided forms as examples to be used for reporting expenses for reimbursement in Exhibit 9. The City requires that receipts for expenses not covered by the per diem be attached to the reimbursement request forms for proper verification and processing. Forms Attached as Exhibit 9 are: 1) Personal Vehicle Mileage Record, and 2) Travel & Miscellaneous Expense Report. Customer may use their own forms for reporting travel expenses that provide the same information requested in the forms found in Exhibit 9.

Confidential or Proprietary Information. All proposals become the property of the City upon receipt and will not be returned. Any information deemed to be confidential by Respondent should be clearly noted; however, City cannot guarantee that it will not be compelled to disclose all or part of any public record under the Texas Public Information Act, since information deemed to be confidential by Respondent may not be considered confidential under Texas law, or pursuant to a Court order. Respondent acknowledge that exemptions to Public Information Act requests may require a brief to be submitted to the Texas Attorney General explaining why the claimed exceptions apply to the information in issue. The City shall not be obligated to submit the brief supporting those claimed exceptions. Respondent shall be solely responsible for submitting the brief and the documents in issue to the Texas Attorney General.

Cost of Proposal. Any cost or expense incurred by the Respondent that is associated with the preparation of the Proposal, the Pre-Submittal conference, if any, or during any phase of the selection process, shall be borne solely by Respondent.

#### Restrictions on Communication.

Respondents are prohibited from communicating with: 1) City officials, as defined by §2-62 of the City Code of the City of San Antonio, regarding the RFCSP or proposals from the time the RFCSP has been released until the contract is posted for consideration as a City Council agenda item during a meeting designated as an A session; and 2) City employees from the time the RFCSP has been released until the contract is awarded. These restrictions extend to "thank you" letters, phone calls, emails and any contact that results in the direct or indirect discussion of the RFCSP and/or proposal submitted by Respondent. Violation of this provision by Respondent and/or its agent may lead to disqualification of Respondent's proposal from consideration.

Exceptions to the restrictions on communication with City employees include:

Respondents may ask verbal questions concerning this RFCSP at the Pre-Submittal Conference.

Respondents may submit written questions concerning this RFCSP to the Staff Contact Person listed below until **2:00 p.m., Central Time, on August 10, 2020**. Questions received after the stated deadline will not be answered. Questions submitted and City's responses will be posted with this solicitation. All questions shall be sent by e-mail or through the portal.

Respondents may provide responses to questions asked of them by the Staff Contact Person after proposals are received and opened. The Staff Contact Person may request clarification to assist in evaluating Respondent's response. The information provided is not intended to change the proposal response in any fashion. Such additional information must be provided within two business days from City's request. Respondents may also respond to requests by the Staff Contact Person for best and final offers, which do allow respondents to change their proposals. Requests for best and final offers will be clearly designated as such. During interviews, if any,

verbal questions and explanations will be permitted. If interviews are conducted, respondents shall not bring lobbyists. The City reserves the right to exclude any persons from interviews as it deems in its best interests.

Respondents and/or their agents are encouraged to contact the Small Business Office of the Economic Development Department for assistance or clarification with issues specifically related to the City's Small Business Economic Development Advocacy (SBEDA) Program policy and/or completion of the required SBEDA forms. The point of contact may be reached by telephone at (210) 207-3922 or by e-mail at [SBEDAdocs@sanantonio.gov](mailto:SBEDAdocs@sanantonio.gov). ***This exception to the restriction on communication does not apply, and there is no contact permitted to the Small Business Office regarding this solicitation, after the solicitation closing date.***

Respondents may contact the Vendor Support staff at (210) 207-0118 or by email at [vendors@sanantonio.gov](mailto:vendors@sanantonio.gov) for assistance with vendor registration and submitting electronic bids.

Upon completion of the evaluation process, Respondents shall receive a notification letter indicating the recommended firm, anticipated City Council agenda date, and a review of the solicitation process.

Staff Contact Person:

Connie Beniquez, Procurement Specialist II  
City of San Antonio, Finance Department, Purchasing Division  
[Connie.Beniquez@sanantonio.gov](mailto:Connie.Beniquez@sanantonio.gov)

#### Changes to RFCSP.

Changes to the RFCSP, made prior to the due date for proposals shall be made directly to the original RFCSP. Changes are captured by creating a replacement version each time the RFCSP is changed. It is Respondent's responsibility to check for new versions until the proposal due date. City will assume that all proposals received are based on the final version of the RFCSP as it exists on the day proposals are due.

No oral statement of any person shall modify or otherwise change or affect the terms, conditions or specifications stated in the RFCSP.

Withdrawal of Proposals. Proposals may be withdrawn prior to the due date for submission. Proposals submitted electronically may be withdrawn electronically.

Proposal Opening. Proposals will be opened publicly by reading the names of the Respondents aloud online through WebEx at 2:30 pm CT on the day the proposals are due.

However, in accordance with state law, the contents will not be revealed until after the contract is awarded.

#### To Join the Webex meeting:

Join by phone: 1-415-655-0001 (Toll-free Dial In)  
Meeting number (access code): 289 671 748  
Meeting password: COSA

#### Prohibited Financial Interest.

The Charter of the City of San Antonio and the City of San Antonio Code of Ethics prohibit a City officer or employee, as those terms are defined in §§ 2-42 and 2-52 of the Code of Ethics, from having a direct or indirect financial interest in any contract with City. An officer or employee has a prohibited "financial interest" in a contract with City or in the sale to City of land, materials, supplies, or service if any of the following individual(s) or entities is a party to the contract or sale:

- A City officer or employee; his or her spouse, sibling, parent, child, or other family member within the first degree of consanguinity or affinity;
- An entity in which the officer or employee, or his or her parent, child or spouse directly or indirectly owns (i) 10% or more of the voting stock or shares of the entity, or (ii) 10% or more of the fair market value of the entity; or
- An entity in which any individual or entity listed above is (i) a subcontractor on a City contract, (ii) a partner or (iii) a parent or subsidiary entity.

By submitting a proposal, Respondent warrants and certifies, and a contract awarded pursuant to this RFCSP is made in reliance thereon, that none of the above listed individuals or entities is a party to this contract.

State of Texas Conflict of Interest Questionnaire (Form CIQ). Chapter 176 of the Texas Local Government Code requires that persons, or their agents, who seek to contract for the sale or purchase of property, goods, or services with the City, shall file a completed Form CIQ with the City Clerk if those persons meet the requirements under §176.006(a) of the statute.

By law this questionnaire must be filed with the City Clerk not later than the 7th business day after the date the vendor becomes aware of facts that require the statement to be filed. See Section 176.006(a-1), Texas Local Government Code.

Form CIQ is available from the Texas Ethics Commission by accessing the following web address:

<https://www.ethics.state.tx.us/forms/conflict/>

In addition, please complete the **City's Addendum to Form CIQ (Form CIQ-A)** and submit it with Form CIQ to the Office of the City Clerk. The Form CIQ-A can be found at:

<http://www.sanantonio.gov/Ethics/ForCompliance/Vendors-And-Conflict-of-Interest-Reports>

When completed, the CIQ Form and the CIQ-A Form should be submitted together by mail to the Office of the City Clerk. Please mail to:

Office of the City Clerk, P.O. Box 839966, San Antonio, TX 78283-3966.

**Do not include these forms with your proposal. The Purchasing Division will not deliver the forms to the City Clerk for you.**

## 009 AWARD OF CONTRACT AND RESERVATION OF RIGHTS

City reserves the right to award one, more than one, or no contract(s) in response to this RFCSP.

The Contract, if awarded, will be awarded to the Respondent(s) whose Proposal(s) is deemed most advantageous to City, as determined by the selection committee, upon approval of the City Council.

City may accept any Proposal in whole or in part. However, final selection of a Respondent is subject to City Council approval.

City reserves the right to accept one or more proposals or reject any or all proposals received in response to this RFCSP, and to waive informalities and irregularities in the proposals received. City also reserves the right to terminate this RFCSP, and reissue a subsequent solicitation, and/or remedy technical errors in the RFCSP process.

City will require the selected Respondent(s) to execute a contract with the City, prior to City Council award, incorporating the terms and conditions of this RFCSP. No work shall commence until City signs the contract document(s) and Respondent provides the necessary evidence of insurance as required in this RFCSP and the Contract. Contract documents are not binding on City until approved by the City Attorney. In the event the parties cannot execute a contract within the time specified, City reserves the right to terminate contract discussions with the selected Respondent and commence contract discussions with another Respondent.

This RFCSP does not commit City to enter into a Contract, award any services related to this RFCSP, nor does it obligate City to pay any costs incurred in preparation or submission of a proposal or in anticipation of a contract.

If selected, Respondent will be required to comply with the (a) Venue, Jurisdiction and Arbitration, (b) Insurance and (c) Indemnification requirements established herein. If Respondent takes exception to these terms, the City will deem the Respondent non-responsive and not evaluate their proposal.

The successful Respondent must be able to formally invoice the City for services rendered, incorporating the SAP-generated contract and purchase order numbers that shall be provided by the City.

**010 BONDS**

This section left blank intentionally.

### **011 SOFTWARE ESCROW REQUIREMENT**

If the City elects to utilize its option to license the Vendor's solution or otherwise contract for use of the software, the City may, at its sole discretion, require Vendor to place the source code in escrow with a trusted third party. The release conditions of the source code may be negotiated between the City and Vendor, but at a minimum, the source code must be released in the event of Vendor's bankruptcy or failure to provide support as required by the written agreement executed by the City and Vendor. The City shall determine, at its sole discretion, the level and form of verification provided by the selected escrow company.

## 012 ACCEPTANCE CRITERIA

All deliverables submitted to the City hereunder shall be submitted to a designated City employee for approval and that such deliverables comply in all material respects with the requirements as set forth in a Statement of Work.

In the event of any nonconformity or nonfunctionality of deliverables, the City shall provide Respondent written notification within 14 days of delivery. Upon receipt of such notice of nonconformity or nonfunctionality, Respondent shall have 14 days to cure the nonconformity or nonfunctionality.

Upon delivery of the cure, the City will have 14 days to evaluate and determine if such cure is acceptable. In the event the Deliverable remains unacceptable, the City will provide a second notice of nonconformity or nonfunctionality of the system within 30 days of delivery. Respondent shall have an additional 14 days to cure the nonconformity or nonfunctionality.

Upon delivery of the cure, the City will have 14 days to evaluate and determine if such cure is acceptable. In the event the Deliverable remains unacceptable the City will provide Respondent with a third notice of any nonconformity or nonfunctionality of the system and Respondent will forfeit 50% of retained balances on hold with the City at the time the third notice is provided to Respondent.

A retainage in the amount of 10% of the deliverable price shall be held by the City, to be paid upon final acceptance. The City Project Team will review, approve, and sign off on the deliverable. Upon acceptance of each milestone, Contractor will be paid 90% of the agreed upon milestone.

Upon final acceptance, Contractor shall invoice the City for the 10% final acceptance hold-back payment.



## 013 SUPPLEMENTAL TERMS & CONDITIONS

Original Contract Term. This contract shall begin upon the effective date of the ordinance awarding the contract, or date specified in the award letter, whichever is later. This contract shall terminate at the end of a three (3) year period, unless sooner terminated in accordance with the provisions of this contract.

### Renewals.

At City's option, this contract may be renewed under the same terms and conditions for (2) two additional, one (1) year periods. Renewals shall be in writing and signed by the Director, without additional City Council approval, subject to and contingent upon appropriation of funding therefore.

Temporary Short-Term Extensions. City shall have the right to extend this contract under the same terms and conditions beyond the original term or any renewal thereof, on a month to month basis, not to exceed three months. Said month to month extensions shall be in writing, signed by Director, and shall not require City Council approval, subject to and contingent upon appropriation of funding therefore.

### Temporary Contract Pending Award of Contract by City Council.

Occasionally, the City has a need for goods or services prior to the date set for the San Antonio City Council to consider a contract for award. If such a situation arises with regard to this solicitation, and if City intends to recommend Vendor's bid to the City Council for award of a contract, City may require Vendor to provide goods or services prior to the date set for City Council to consider the bid for award of a contract. City shall provide Vendor advance written notice if such occasion arises.

In such event, City's written notice shall constitute acceptance of Vendor's bid and shall result in a temporary contract to provide goods and/or services until City Council considers and awards the contract contemplated in this solicitation. The total expenditure under the temporary contract shall not exceed \$50,000. The temporary contract shall begin on the date set forth in City's written notice and shall terminate when the total expenditure reaches \$50,000, or upon subsequent written notice from City, whichever shall occur sooner. Should City Council authorize award of a contract to Vendor pursuant to this solicitation, said award shall automatically terminate the temporary contract upon the effective date of the newly awarded contract.

During the term of the temporary contract, all goods or services shall be provided in accordance with the terms and conditions contained in this solicitation, with the exception of the Original Contract Term, which is modified as indicated above for the temporary contract.

Acceptance of Vendor's bid for the purposes of award of a temporary contract does not constitute award of the full contract with the Original Contract Term. Such a contract may only be awarded by the San Antonio City Council by passage of an ordinance. Neither does award of a temporary contract obligate City to recommend Vendor's bid for award to the City Council, or guarantee that the City Council will award the contract to Vendor.

### Insurance.

Prior to the commencement of any work under this Agreement, Respondent shall furnish copies of all required endorsements and an original completed Certificate(s) of Insurance to the City of San Antonio Government and Public Affairs Office, which shall be clearly labeled "Resident Connection Platform" in the Description of Operations block of the Certificate. The Certificate(s) shall be completed by an agent and signed by a person authorized by that insurer to bind coverage on its behalf. City will not accept a Memorandum of Insurance or Binder as proof of insurance. The certificate(s) must have the agent's signature and phone number, and be mailed, with copies of all applicable endorsements, directly from the insurer's authorized representative to City. City shall have no duty to pay or perform under this Agreement until such certificate and endorsements have been received and approved by City of San Antonio Government and Public Affairs Office. No officer or employee, other than City's Risk Manager, shall have authority to waive this requirement.

City reserves the right to review the insurance requirements of this Article during the effective period of this Agreement and any extension or renewal hereof and to modify insurance coverages and their limits when deemed necessary and prudent by City's Risk Manager based upon changes in statutory law, court decisions, or circumstances surrounding this Agreement. In no instance will City allow modification whereupon City may incur increased risk.

A Respondent's financial integrity is of interest to City; therefore, subject to Respondent's right to maintain reasonable deductibles in such amounts as are approved by City, Respondent shall obtain and maintain in full force and effect for the

duration of this Agreement, and any extension hereof, at Respondent's sole expense, insurance coverage written on an occurrence basis, by companies authorized to do business in the State of Texas and with an A.M Best's rating of no less than A- (VII), in the following types and for an amount not less than the amount listed below:

TYPE	AMOUNTS
1. Workers' Compensation	Statutory
2. Employers' Liability	\$1,000,000/\$1,000,000/\$1,000,000
3. Commercial General Liability Insurance to include coverage for the following: a. Premises/Operations b. Products/Completed Operations c. Personal/Advertising Injury d. Contractual Liability e. Independent Contractors	For <u>Bodily Injury</u> and <u>Property Damage</u> of \$1,000,000 per occurrence; \$2,000,000 General Aggregate, or its equivalent in Umbrella or Excess Liability Coverage
4. Business Automobile Liability a. Owned/leased vehicles b. Non-owned vehicles c. Hired Vehicles	<u>Combined Single Limit</u> for <u>Bodily Injury</u> and <u>Property Damage</u> of \$1,000,000 per occurrence
5. Professional Liability	\$1,000,000 per claim damages by reason of any act, malpractice, error, or omission in the professional service.  Coverage to be maintained and in effect for no less than two years subsequent to the completion of the professional service.
6. Cyber Liability	\$1,000,000 per claim \$2,000,000 general aggregate, or its equivalent in Umbrella or Excess Liability Coverage.

Respondent agrees to require, by written contract, that all subcontractors providing goods or services hereunder obtain the same insurance coverages required of Respondent herein and provide a certificate of insurance and endorsement that names Respondent and City as additional insureds. Respondent shall provide City with said certificate and endorsement prior to the commencement of any work by the subcontractor. This provision may be modified by City's Risk Manager, without subsequent City Council approval, when deemed necessary and prudent, based upon changes in statutory law, court decisions, or circumstances surrounding this agreement. Such modification may be enacted by letter signed by City's Risk Manager, which shall become a part of the contract for all purposes.

As they apply to the limits required by City, City shall be entitled, upon request and without expense, to receive copies of the policies, declaration page and all endorsements thereto and may require the deletion, revision, or modification of particular policy terms, conditions, limitations or exclusions (except where policy provisions are established by law or regulation binding upon either of the parties hereto or the underwriter of any such policies). Respondent shall be required to comply with any such requests and shall submit a copy of the replacement certificate of insurance to City at the address provided below within 10 days of the requested change. Respondent shall pay any costs incurred resulting from said changes.

City of San Antonio  
Attn: Government and Public Affairs Office  
P.O. Box 839966  
San Antonio, Texas 78283-3966

Respondent agrees that with respect to the above required insurance, all insurance policies are to contain or be endorsed to contain the following provisions:

- Name the City, its officers, officials, employees, volunteers, and elected representatives as additional insured by endorsement, as respects operations and activities of, or on behalf of, the named insured performed under contract with the City, with the exception of the workers' compensation and professional liability policies;
- Provide for an endorsement that the "other insurance" clause shall not apply to the City of San Antonio where City is an additional insured shown on the policy;

- Workers' compensation and employers' liability, general liability and automobile liability policies will provide a waiver of subrogation in favor of the City; and
- Provide advance written notice directly to City of any suspension, cancellation, non-renewal or material change in coverage, and not less than ten (10) calendar days advance notice for nonpayment of premium.

Within five (5) calendar days of a suspension, cancellation or non-renewal of coverage, Respondent shall provide a replacement Certificate of Insurance and applicable endorsements to City. City shall have the option to suspend Respondent's performance should there be a lapse in coverage at any time during this Agreement. Failure to provide and to maintain the required insurance shall constitute a material breach of this Agreement.

In addition to any other remedies the City may have upon Respondent's failure to provide and maintain any insurance or policy endorsements to the extent and within the time herein required, the City shall have the right to order Respondent to stop work hereunder, and/or withhold any payment(s) which become due to Respondent hereunder until Respondent demonstrates compliance with the requirements hereof.

Nothing herein contained shall be construed as limiting in any way the extent to which Respondent may be held responsible for payments of damages to persons or property resulting from Respondent's or its subcontractors' performance of the work covered under this Agreement.

It is agreed that Respondent's insurance shall be deemed primary and non-contributory with respect to any insurance or self-insurance carried by the City of San Antonio for liability arising out of operations under this Agreement.

It is understood and agreed that the insurance required is in addition to and separate from any other obligation contained in this Agreement and that no claim or action by or on behalf of City shall be limited to insurance coverage provided.

Respondent and any subcontractors are responsible for all damage to their own equipment and/or property.

Undisclosed Features. Contractor warrants that the code and software provided to the City of San Antonio under this agreement does not contain any undisclosed features or functions that would impair or might impair the City's use of the equipment, code or software. Specifically, but without limiting the previous representation, Contractor warrants there is no "Trojan Horse," lock, "time bomb," backdoor or similar routine. This Agreement shall not now nor will it hereafter be subject to the self-help provisions of the Uniform Computer Information Transactions Act or any other law. Contractor specifically disclaims any unilateral self-help remedies.

Interlocal Participation.

The City may, from time to time, enter into Interlocal Cooperation Purchasing Agreements with other governmental entities or governmental cooperatives (hereafter collectively referred to as "Entity" or "Entities") to enhance the City's purchasing power. At the City's sole discretion and option, City may inform other Entities that they may acquire items listed in this "RFCSP". Such acquisition(s) shall be at the prices stated herein, and shall be subject to vendor's acceptance. Entities desiring to acquire items listed in this RFCSP shall be listed on a rider attached hereto, if known at the time of issuance of the RFCSP. City may issue subsequent riders after contract award setting forth additional Entities desiring to utilize this contract. VENDOR shall sign and return any subsequently issued riders within ten calendar days of receipt.

In no event shall City be considered a dealer, remarketer, agent or other representative of Vendor or Entity. Further, City shall not be considered and is not an agent, partner or representative of the Entity making purchases hereunder, and shall not be obligated or liable for any such order.

Entity purchase orders shall be submitted to Vendor by the Entity.

Vendor authorizes City's use of Vendor's name, trademarks and Vendor provided materials in City's presentations and promotions regarding the availability of use of this contract. The City makes no representation or guarantee as to any minimum amount being purchased by City or Entities, or whether Entity will purchase utilizing City's contract.

**CITY WILL NOT BE LIABLE OR RESPONSIBLE FOR ANY OBLIGATIONS, INCLUDING, BUT NOT LIMITED TO, PAYMENT, AND FOR ANY ITEM ORDERED BY AN ENTITY OTHER THAN CITY.**

Incorporation of Attachments.

Each of the attachments listed below is an essential part of this contract, which governs the rights and duties of the parties, incorporated herein by reference, and shall be interpreted in the order of priority as appears below, with this document taking priority over all attachments:

- Attachment A, Part One – General Information Form
- Attachment A, Part Two – Experience, Background, and Qualifications
- Attachment A, Part Three – Proposed Plan and Solution
- Attachment B – Price Schedule
- Attachment C – Contracts Disclosure Form
- Attachment D – Litigation Disclosure Form
- Attachment E – Veteran-Owned Small Business Program Tracking Form
- Attachment F – Certificate of Interested Parties
- Attachment G – Signature Page
- Attachment H – Subcontractor/Supplier Utilization Plan
- Attachment I - Proposal Checklist

## 014 General Terms & Conditions

### Delivery of Goods/Services.

Destination Contract. Vendor shall deliver all goods and materials F.O.B., City of San Antonio's designated facility, inside delivery, freight prepaid, to the address provided in this RFCSP or, if different, in the Purchase Order. Vendor shall bear the risk of loss until delivery. Freight charges will be paid only when expedited delivery is requested and approved in writing by the City. Vendor shall be responsible for furnishing necessary personnel or equipment and/or making necessary arrangements to off load at City of San Antonio facility, unless otherwise noted herein.

Failure to Deliver. When delivery is not met as provided for in the contract, the City may make the purchase on the open market, with any cost in excess of the contract price paid by Vendor, in addition to any other direct, indirect, consequential or incidental damages incurred by the City as a result thereof. In addition, Vendor may be removed from the City's list of eligible bidders.

Purchase Orders. Each time a City department wishes to place an order against this contract, it will issue Vendor a purchase order. Vendor must have the purchase order prior to incurring any costs for which City may be liable.

Testing. After award of contract, City may, at its sole option, test the product delivered to ensure it meets specifications. Initial testing shall be at City's expense. However, if the product does not meet specifications, Vendor shall reimburse City for the costs of testing. City may withhold the cost of testing from any amounts owed to Vendor under this or any other contract, or invoice Vendor for same. If invoiced, Vendor shall pay City within 30 calendar days of the invoice.

Warranty. A minimum of 90-days product guarantee or the manufacturer's standard commercial warranty, whichever is greater, shall apply to all products and/or services purchased under this RFCSP, unless otherwise specified in the Specifications/Scope of Services section of this RFCSP. This warranty shall provide for replacement of defective merchandise, parts, and labor, and shall include pick-up of the defective merchandise from City and delivery of the replacement(s) to the same location. The warranty shall be effective from the date of acceptance of the merchandise, or completion of the service, as applicable.

**REJECTION OF DISCLAIMERS OF WARRANTIES & LIMITATIONS OF LIABILITY. ANY TERM OR CONDITION IN ANY DOCUMENT FURNISHED BY VENDOR, DISCLAIMING THE IMPLIED WARRANTY OF MERCHANTABILITY OR OF FITNESS FOR A PARTICULAR PURPOSE, OR ATTEMPTING TO LIMIT VENDOR'S LIABILITY SHALL BE OF NO FORCE OR EFFECT, AND SHALL BE STRICKEN FROM THE CONTRACT DOCUMENTS AS IF NEVER CONTAINED THEREIN.**

### Invoicing and Payment.

Invoice Submissions. City requires all **original**, first time invoices to be submitted directly to the Accounts Payable section of the Finance Department. The preferred method of delivery is electronically to the following e-mail address:

[accounts.payable@sanantonio.gov](mailto:accounts.payable@sanantonio.gov).

Invoices submitted electronically to the e-mail address above must be in separate .pdf format file. Multiple invoices cannot be submitted in a single .pdf file; however, Vendor may submit multiple, separate invoice files in a single e-mail. Any required documentation in support of the invoice should be compiled directly behind the invoice in the same .pdf file. Each electronically submitted file must have a unique identifying name that is not the same as any other file name.

Invoices submitted by electronic submission are only considered "original" when the submission comes directly from the Vendor to Accounts Payable using this e-mail address. Vendor may courtesy copy the ordering City department personnel on the e-mail.

Vendors not able to submit invoices with the required file formatting above may mail original invoices, on white paper only, to: City of San Antonio, Attn: Accounts Payable, P.O. Box 839976, San Antonio, Texas 78283-3976.

### Information Required On Invoice.

All invoices must be in a form and content approved by the City. City may require modification of invoices if necessary in order to satisfy City that all billing is proper and pursuant to the terms of the contract. Invoices are required to show each City Purchase Order Number, Vendor name, Vendor dba name, address, remit address for payment, unique invoice number, and invoice date (of issue by Vendor). Invoices must be legible. Items billed on invoices must be

specific as to applicable stock, manufacturer, catalog or part number (if any). All invoices must show unit prices for each item being billed, the quantity of items being billed and the total for each item, as well as the total for all items on the invoice. If prices are based on list prices basis, then the list prices, the percentage discount or percentage surcharge, net unit prices, extensions and net total prices must be shown. Prompt payment discounts offered shall be shown separately on the invoice.

#### Payment by City.

In accordance with the Texas Prompt Payment Act, City shall have not less than 30 days to pay for goods or services. Time for payment, including payment under discount terms, will be computed from the later of: (1) the date the City receives conforming goods under the contract; (2) the date performance of the service under the contract is completed; or (3) the date the City receives a correct and valid invoice for the goods or services. Payment is deemed to be made on the date of mailing of the check. Payment is made in US dollars only.

This provision shall not apply where there is a bona fide dispute between the City and Vendor about the goods delivered or the service performed that causes the payment to be late, or where the invoice is not mailed to the address provided herein.

The payment amount due on invoices may not be manually altered by City personnel. Once disputed items are reconciled, Vendor must submit a corrected invoice or a credit memorandum for the disputed amount. City will not make partial payments on an invoice where there is a dispute.

**NECESSITY OF TIMELY INVOICE / WAIVER OF PAYMENT.** NOTWITHSTANDING THE FORGOING, CITY CANNOT PAY FOR ANY GOODS OR SERVICES WITHOUT AN INVOICE. VENDOR MUST INVOICE CITY NO LATER THAN 90 CALENDAR DAYS FROM THE DATE GOODS ARE DELIVERED OR SERVICES RENDERED. FAILURE TO SUBMIT AN INVOICE WITHIN SAID 90 DAYS SHALL NEGATE ANY LIABILITY ON THE PART OF CITY AND CONSTITUTE A **WAIVER** BY VENDOR OF ANY AND ALL RIGHT OR CLAIMS TO COLLECT MONEYS THAT VENDOR MAY RIGHTFULLY BE OTHERWISE ENTITLED TO FOR GOODS OR SERVICES PERFORMED.

The total price for all goods and/or services is shown on the Price Schedule. No additional fees or expenses of Vendor shall be charged by Vendor nor be payable by City. The parties hereby agree that all compensable expenses of Vendor are shown on the Price Schedule. If there is a discrepancy on the Price Schedule between the unit price for an item, and the extended price, the unit price shall govern. Unless otherwise provided in the Supplemental Terms and Conditions section of this document, all prices shown on the Price Schedule shall remain firm for the duration of the contract. Vendor's price stated on the Price Schedule shall be deemed a maximum price. Vendor may provide a lower price at any time during the contract period for reasons deemed appropriate by Vendor, such as volume discount pricing for large orders.

Change Orders. In order to comply with Texas law governing purchases made by municipalities, the following rules shall govern all change orders made under this contract.

Any change orders that become necessary during the term of this contract as a result of changes in plans, specifications, quantity of work to be performed, materials, equipment or supplies to be furnished must be in writing and conform to the requirements of City Ordinance 2011-12-08-1014, as hereafter amended.

Any other change will require approval of the City Council, City of San Antonio.

Changes that do not involve an increase in contract price may be made by the Director.

No oral statement of any person shall modify or otherwise change, or affect the terms, conditions or specifications stated herein.

#### Termination.

Termination-Breach. Should Vendor fail to fulfill in a timely and proper manner, as determined solely by the Director, its material obligations under this contract, or violate any of the material terms of this contract, the City shall have the right to immediately terminate the contract in whole or in part. Notice of termination shall be provided in writing to Vendor, effective upon the date set forth in the notice. City may, in City's sole discretion, provide an opportunity for Vendor to cure the default. If City elects to offer an opportunity to cure, City shall provide notice to Vendor specifying the matters in default and the cure period. If Vendor fails to cure the default within the cure period, City shall have the right, without further notice, to terminate the contract in whole or in part. Such termination shall not relieve Vendor of any liability to the City for damages sustained by virtue of any breach by Vendor.

Termination-Notice. City may terminate this contract, in whole or in part, without cause. City shall be required to give Vendor notice ten days prior to the date of termination of the contract without cause.

Termination-Funding. City retains the right to terminate this contract at the expiration of each of City's budget periods. This contract is conditioned on a best efforts attempt by City to obtain and appropriate funds for payment of any debt due by City herein.

Termination by City may be effected by Director, without further action by the San Antonio City Council.

Independent Contractor. Vendor covenants and agrees that it is an independent contractor and not an officer, agent, servant or employee of City. City shall not be liable for any claims which may be asserted by any third party occurring in connection with the services to be performed by Vendor under this contract and that Vendor has no authority to bind City. The doctrine of respondeat superior shall not apply as between City and Vendor.

#### INDEMNIFICATION.

**VENDOR covenants and agrees to FULLY INDEMNIFY, DEFEND and HOLD HARMLESS, CITY and the elected officials, employees, officers, directors, volunteers and representatives of CITY, individually and collectively, from and against any and all costs, claims, liens, damages, losses, expenses, fees, fines, penalties, proceedings, actions, demands, causes of action, liability and suits of any kind and nature, including but not limited to, personal or bodily injury, death and property damage, made upon the CITY directly or indirectly arising out of, resulting from or related to VENDOR'S activities under this Agreement, including any acts or omissions of VENDOR, any agent, officer, director, representative, employee, consultant or subcontractor of VENDOR, and their respective officers, agents employees, directors and representatives while in the exercise of the rights or performance of the duties under this Agreement. The indemnity provided for in this paragraph shall not apply to any liability resulting from the negligence of CITY, its officers or employees, in instances where such negligence causes personal injury, death, or property damage. IN THE EVENT VENDOR AND CITY ARE FOUND JOINTLY LIABLE BY A COURT OF COMPETENT JURISDICTION, LIABILITY SHALL BE APPORTIONED COMPARATIVELY IN ACCORDANCE WITH THE LAWS FOR THE STATE OF TEXAS, WITHOUT, HOWEVER, WAIVING ANY GOVERNMENTAL IMMUNITY AVAILABLE TO THE CITY UNDER TEXAS LAW AND WITHOUT WAIVING ANY DEFENSES OF THE PARTIES UNDER TEXAS LAW. In addition, Vendor agrees to indemnify, defend, and hold the City harmless from any claim involving patent infringement, trademarks, trade secrets, and copyrights on goods supplied.**

The provisions of this INDEMNITY are solely for the benefit of the parties hereto and not intended to create or grant any rights, contractual or otherwise, to any other person or entity. VENDOR shall advise CITY in writing within 24 hours of any claim or demand against CITY or VENDOR known to VENDOR related to or arising out of VENDOR's activities under this AGREEMENT and shall see to the investigation and defense of such claim or demand at VENDOR's cost. CITY shall have the right, at its option and at its own expense, to participate in such defense without relieving VENDOR of any of its obligations under this paragraph.

Intellectual Property. Respondent agrees to abide by the following regarding intellectual property rights:

Respondent shall pay all royalties and licensing fees. Respondent shall hold the City harmless and indemnify the City from the payment of any royalties, damages, losses or expenses including attorney's fees for suits, claims or otherwise, growing out of infringement or alleged infringement of copyrights, patents, trademarks, trade secrets, materials and methods used in the project. It shall defend all suits for infringement of any Intellectual Property rights. Further, if Respondent has reason to believe that the design, service, process or product specified is an infringement of an Intellectual Property right, it shall promptly give such information to the City.

Upon receipt of notification that a third-party claims that the program(s), hardware or both the program(s) and the hardware or any other intellectual property infringe upon any United States or International patent, copyright or trademark, Respondent will immediately:

1. Obtain, at Respondent's sole expense, the necessary license(s) or rights that would allow the City to continue using the programs, hardware, both the programs and hardware or any other intellectual property as the case may be, or
2. Alter the programs, hardware, or both the programs and hardware so that the alleged infringement is eliminated; and

3. Reimburse the City for any expenses incurred by the City to implement emergency backup measures if the City is prevented from using the programs, hardware, or both the programs and hardware while the dispute is pending.

Respondent further agrees to

assume the defense of any claim, suit, or proceeding brought against the City for infringement of any United States patent, copyright, trademark or any other intellectual property rights arising from the use and/or sale of the equipment or software under this Agreement,

assume the expense of such defense, including costs of investigations, reasonable attorneys' fees, expert witness fees, damages, and any other litigation-related expenses, and

indemnify the City against any monetary damages and/or costs awarded in such suit;

provided that

Respondent is given sole and exclusive control of all negotiations relative to the settlement thereof, but that Respondent agrees to consult with the City Attorney of the City during such defense or negotiations and make good faith effort to avoid any position adverse to the interest of the City,

the Software or the equipment is used by the City in the form, state, or condition as delivered by Respondent or as modified without the permission of Respondent, so long as such modification is not the source of the infringement claim,

the liability claimed shall not have arisen out of the City's negligent act or omission, and

the City promptly provide Respondent with written notice within 15 days following the formal assertion of any claim with respect to which the City asserts that Respondent assumes responsibility under this section.

#### Ownership of Documents and Licenses.

In accordance with Texas law, Respondent acknowledges and agrees that all local government records created or received in the transaction of official business or the creation or maintenance of which were paid for with public funds are declared to be public property and subject to the provisions of Chapter 201 of the Texas Local Government Code and Subchapter J, Chapter 441 of the Texas Government Code. Thus, no such local government records produced by or on the behalf of Respondent pursuant to this Contract shall be the subject of any copyright or proprietary claim by Respondent.

The term "local government record" as used herein shall mean any document, paper, letter, book, map, photograph, sound or video recording, microfilm, magnetic tape, electronic medium, or other information recording medium, regardless of physical form or characteristic and regardless of whether public access to it is open or restricted under the laws of the state, created or received by local government or any of its officials or employees pursuant to law including an ordinance, or in the transaction of official business.

Respondent acknowledges and agrees that all local government records, as described in herein, produced in the course of the work required by any contract awarded pursuant to this RFCSP, will belong to and be the property of City. Respondent, if awarded this contract, will be required to turn over to City, all such records as required by said contract. Respondent, if awarded this contract, shall not, under any circumstances, release any records created during the course of performance of the contract to any entity without City's written permission, unless required to do so by a Court of competent jurisdiction.

In accordance herewith, Respondent, if selected, agrees to comply with all applicable federal, state and local laws, rules and regulations governing documents and ownership, access and retention thereof.

#### Records Retention.

Vendor and its subcontractors, if any, shall properly, accurately and completely maintain all documents, papers, and records, and other evidence pertaining to the services rendered hereunder ("Documents"), and shall make such Documents available to the City at their respective offices, at all reasonable times and as often as City may deem necessary during the contract period, including any extension or renewal hereof, and the record retention period



established herein, for purposes of audit, inspection, examination, and making excerpts or copies of same by City and any of its authorized representatives.

Vendor shall retain any and all Documents produced as a result of services provided hereunder for a period of four years ("Retention Period") from the date of termination of the contract. If, at the end of the Retention Period, there is litigation or other questions arising from, involving or concerning these Documents or the services provided hereunder, Vendor shall retain the records until the resolution of such litigation or other such questions. Vendor acknowledges and agrees that City shall have access to any and all such Documents at any and all times, as deemed necessary by City, during said Retention Period. City may, at its election, require Vendor to return the documents to City at Vendor's expense prior to or at the conclusion of the Retention Period. In such event, Vendor may retain a copy of the documents.

Vendor shall notify City, immediately, in the event Vendor receives any requests for information from a third party, which pertain to the Documents referenced herein. Vendor understands and agrees that City will process and handle all such requests.

S.B. 943 – Disclosure Requirements for Certain Government Contracts. For contracts (1) with a stated expenditure of at least \$1 million in public funds for the purchase of goods or services by the City, or (2) that result in the expenditure of at least \$1 million in public funds for the purchase of goods or services by the City in a given fiscal year, Vendor acknowledges that the requirements of the Texas Public Information Act, Government Code, Chapter 552, Subchapter J, pertaining to the preservation and disclosure of Contracting Information maintained by the City or sent between the City and a vendor, contractor, potential vendor, or potential contractor, may apply to this bid and any resulting contract. Vendor agrees that the contract can be terminated if Vendor knowingly or intentionally fails to comply with a requirement of that subchapter.

By submitting a bid, Bidder warrants and certifies, and a contract awarded pursuant to this RFCSP is made in reliance thereon, that it, has not knowingly or intentionally failed to comply with this subchapter in a previous bid or contract. City hereby relies on Vendor's certification, and if found to be false, City may reject the bid or terminate the Contract for material breach.

Certifications. Respondent warrants and certifies that Respondent and any other person designated to provide services hereunder has the requisite training, license and/or certification to provide said services, and meets all competence standards promulgated by all other authoritative bodies, as applicable to the services provided herein.

Assignment. Except as otherwise stated herein, Vendor may not sell, assign, pledge, transfer or convey any interest in this contract, nor delegate the performance of any duties hereunder, by transfer, by subcontracting or any other means, without the consent of Director. As a condition of such consent, if such consent is granted, Vendor shall remain liable for completion of the services and provision of goods outlined in this contract in the event of default by the successor vendor, assignee, transferee or subcontractor. Any attempt to transfer, pledge or otherwise assign this Contract without said written approval, shall be void ab initio and shall confer no rights upon any third person.

Severability. If any clause or provision of this contract is held invalid, illegal or unenforceable under present or future federal, state or local laws, including but not limited to the City Charter, City Code, or ordinances of the City of San Antonio, Texas, then and in that event it is the intention of the parties hereto that such invalidity, illegality or unenforceability shall not affect any other clause or provision hereof and that the remainder of this contract shall be construed as if such invalid, illegal or unenforceable clause or provision was never contained herein. It is also the intention of the parties hereto that in lieu of each clause or provision of this contract that is invalid, illegal, or unenforceable, there be added as a part of the contract a clause or provision as similar in terms to such invalid, illegal or unenforceable clause or provision as may be possible, legal, valid and enforceable.

Compliance with Law. Vendor shall provide and perform all services required under this Agreement in compliance with all applicable federal, state and local laws, rules and regulations.

Non-waiver of Performance. Unless otherwise specifically provided for in this Agreement, a waiver by either Party of a breach of any of the terms, conditions, covenants or guarantees of this Agreement shall not be construed or held to be a waiver of any succeeding or preceding breach of the same or any other term, condition, covenant or guarantee herein contained. Further, any failure of either Party to insist in any one or more cases upon the strict performance of any of the covenants of this Agreement, or to exercise any option herein contained, shall in no event be construed as a waiver or relinquishment for the future of such covenant or option. In fact, no waiver, change, modification or discharge by either party hereto of any provision of this Agreement shall be deemed to have been made or shall be effective unless expressed in writing and signed by the party to be charged. No act or omission by a Party shall in any manner impair or

prejudice any right, power, privilege, or remedy available to that Party hereunder or by law or in equity, such rights, powers, privileges, or remedies to be always specifically preserved hereby.

#### Non-discrimination.

As a condition of entering into this agreement, Vendor represents and warrants that it will comply with the City's Commercial Nondiscrimination Policy, as described under Section III.C.1 of the SBEDA Ordinance. As part of such compliance, Vendor shall not discriminate on the basis of race, color, religion, ancestry or national origin, sex, age, marital status, sexual orientation, or on the basis of disability or other unlawful forms of discrimination in the solicitation, selection, hiring or commercial treatment of subcontractors, vendors, suppliers, or commercial customers, nor shall Vendor retaliate against any person for reporting instances of such discrimination. Vendor shall provide equal opportunity for subcontractors, vendors and suppliers to participate in all of its public sector and private sector subcontracting and supply opportunities, provided that nothing contained in this clause shall prohibit or limit otherwise lawful efforts to remedy the effects of marketplace discrimination that have occurred or are occurring in the City's Relevant Marketplace. Vendor understands and agrees that a material violation of this clause shall be considered a material breach of this agreement and may result in termination of this agreement, disqualification of Vendor from participating in City contracts, or other sanctions. This clause is not enforceable by or for the benefit of, and creates no obligation to, any third party. Vendor shall include this nondiscrimination clause in all subcontracts for the performance of this contract.

As a party to this contract, Vendor understands and agrees to comply with the *Non-Discrimination Policy* of the City of San Antonio contained in Chapter 2, Article X of the City Code and further, shall not discriminate on the basis of race, color, religion, national origin, sex, sexual orientation, gender identity, veteran status, age or disability, unless exempted by state or federal law, or as otherwise established herein.

Venue, Jurisdiction and Arbitration. Unless this contract provides otherwise, all claims, counterclaims, disputes, and other matter in question between City and Vendor arising out of or relating to this Agreement or its breach will be decided in a court of competent jurisdiction. Venue of any court action brought directly or indirectly by reason of this contract shall be in Bexar County, Texas. This contract is made to be performed in Bexar County, Texas and is governed by the laws of the State of Texas. The City will not contractually agree to engage in binding arbitration and will not contractually agree to relinquish its right to a trial by jury.

Attorney's Fees. The Parties hereto expressly agree that, in the event of litigation, each party hereby waives its right to payment of attorneys' fees.

#### Prohibition on Contracts with Companies Boycotting Israel.

Texas Government Code §2271.002 provides that a governmental entity may not enter into a contract with a company for goods or services, unless the contract contains a written verification from the company that it:

- (1) Does not boycott Israel; and
- (2) Will not boycott Israel during the term of the contract.

This section only applies to a contract that:

- (1) is between a governmental entity and a company with 10 or more full-time employees; and
- (2) has a value of \$100,000 or more that is to be paid wholly or partly from public funds of the governmental entity.

"Boycott Israel" means refusing to deal with, terminating business activities with, or otherwise taking any action that is intended to penalize, inflict economic harm on, or limit commercial relations specifically with Israel, or with a person or entity doing business in Israel or in an Israeli-controlled territory, but does not include an action made for ordinary business purposes.

"Company" means a for-profit, organization, association, corporation, partnership, joint venture, limited partnership, limited liability partnership, or limited liability company, including a wholly owned subsidiary, majority-owned subsidiary, parent company, or affiliate of those entities or business associations that exists to make a profit. This term does not include a sole proprietorship.

By submitting an offer to or executing contract documents with the City of San Antonio, Company hereby verifies that it does not boycott Israel, and will not boycott Israel during the term of the contract. City hereby relies on Company's verification. If found to be false, City may terminate the contract for material breach

Contracts with Companies Engaged in Business with Iran, Sudan, or Foreign Terrorist Organization Prohibited. Texas Government Code §2252.152 provides that a governmental entity may not enter into a governmental contract with a company that is identified on a list prepared and maintained under Texas Government Code §§2270.0201 or 2252.153. Vendor hereby certifies that it is not identified on such a list and that it will notify City should it be placed on such a list while under contract with City. City hereby relies on Vendor's certification. If found to be false, or if Vendor is identified on such list during the course of its contract with City, City may terminate the Contract for material breach.

Delinquent Taxes. In the event that Vendor is or subsequently becomes delinquent in the payment of taxes owed to the City of San Antonio, the City reserves the right to deduct any delinquent taxes from payments that the City may owe to the delinquent Vendor as a result of this contract.

Binding Contract. This contract shall be binding on and inure to the benefit of the parties hereto and their respective heirs, executors, administrators, legal representatives, and successors and assigns, except as otherwise expressly provided for herein.

Entire Agreement. This contract, including City's final electronically posted online version together with its authorizing ordinance and its price schedule(s), attachments, addendums, purchase orders, and exhibits, if any, and Respondent's proposal, constitutes the final and entire agreement between the parties hereto and contains all of the terms and conditions agreed upon. City's solicitation documents shall control over Respondent's proposal in the event of a conflict. No other agreements, oral or otherwise, regarding the subject matter of this contract shall be deemed to exist or to bind the parties hereto, unless same be in writing, dated subsequent to the date hereof, and be duly executed by the parties, in accordance with the Change Order provision herein. **Parties agree that City's final electronically posted online version of this solicitation contains the agreed upon specifications, scope of services, and terms and conditions of this contract, and shall control in the event of a conflict with any printed version signed and submitted by Vendor. Any addendums issued to the final electronically posted online version of this solicitation shall control in the event of a conflict therewith. Addendums shall be interpreted in order of the date issued, with those issued most recently taking priority.**

## 015 STANDARD DEFINITIONS

Whenever a term defined by the Uniform Commercial Code ("UCC"), as enacted by the State of Texas, is used in the Contract, the UCC definition shall control, unless otherwise defined in the Contract.

All-or-None Bid - a request for competitive sealed proposal in which the City will award the entire contract to one respondent only.

Alternate Proposal - two or more proposals with substantive variations in the item or service offered from the same respondent in response to a solicitation.

Assignment - a transfer of claims, rights or interests in goods, services or property.

Change Order - a change to the plans or specifications of the contract, or an increase or decrease in the quantity of work to be performed or of materials, equipment, or supplies to be furnished, issued by the Director after the proposal has been accepted by the City.

City - the City of San Antonio, a Texas home-rule municipal corporation.

Contract - the binding legal agreement between the City and Vendor.

Contractor - the respondent whose proposal is accepted by the City and is, therefore, the person, firm or entity providing goods or services to the City under a contract.

Director - the Director of City's Finance Department, or Director's designee.

Equal or Equivalent - terms to indicate that similar products or other brands may be acceptable for purchase if specifications and functional requirements are met.

Line Item - a listing of items in a proposal for which a respondent is expected to provide separate pricing.

Non-Responsive Proposal - a proposal or offer that does not comply with the terms and conditions, or specifications and/or requirements of the RFCSP.

Offer - a complete, signed response to an RFCSP that, if accepted, would bind Respondent to perform the resultant contract. The term "offer" is synonymous with the terms "bid" and "proposal".

Payment Bond - a particular form of security provided by the contractor to protect the City against loss due to the contractor's failure to pay suppliers and subcontractors.

Performance Bond - a particular form of security provided by the contractor to protect the City against loss due to the contractor's inability or unwillingness to complete the contract as agreed.

Performance Deposit - security provided by the contractor to protect City against loss due to the contractor's inability or unwillingness to complete the contract as agreed.

Pre-Submittal Conference - a meeting conducted by the City, held in order to allow respondents to ask questions about the proposed contract and particularly, the contract specifications.

Proposal - a complete, signed response to a solicitation. The term "proposal" is synonymous with the terms "offer" and "bid".

Proposal Bond or Proposal Guarantee - security to ensure that Respondent (a) will not withdraw the proposal within the period specified for acceptance, and (b) will furnish any required bonds or performance guarantees, and any necessary insurance within the time specified in the solicitation.

Proposal Opening - a meeting during which proposal responses are opened publicly by reading the names of respondents aloud online through WebEx.

Purchase Order - a validly issued order placed by an authorized City department for the purchase of goods or services, written on the City's standard purchase order form, and which is Vendor's authority to deliver to and invoice the City for the goods or services specified in a RFCSP for the price stated in Vendor's proposal.

Request for Competitive sealed Proposal (RFCSP) - a solicitation for a specified good or a service, evaluated on the basis of price and other factors.

Respondent - a person, firm or entity that submits a proposal in response to a solicitation. The respondent whose proposal is accepted by City may also be referred to herein as Contractor, Vendor or Supplier. The term "respondent" is synonymous with the term "bidder".

Responsible Offeror - a respondent who is known to have the necessary competence and qualifications to perform and provide all requirements of an intended contract.

Responsive Offeror - a respondent who tenders a proposal which meets all requirements of the RFCSP and is a responsible offeror.

Sealed Proposal - a proposal submitted as a sealed document, whether hard copy or electronic, by a prescribed time to the location indicated in the RFCSP. The contents of the proposal will not be made public prior to the award of the contract.

Specifications - a description of what the City requires and what the respondent must offer; a description of the physical or functional characteristics of a product or material, or the nature of a service or construction item.

Subcontractor - a person, firm or entity providing goods or services to a vendor to be used in the performance of the Vendor's obligations under the contract with City.

Supplier - the respondent whose proposal is accepted by the City and is, therefore, the person, firm or entity providing goods or services to the City under a contract.

Vendor - the respondent whose proposal is accepted by the City and is, therefore, the person, firm or entity providing goods or services to the City under a contract.

Waiver of Irregularity - noting but disregarding an immaterial variance within a proposal.

016 RFCSP EXHIBITS

RFCSP EXHIBIT 1

SBEDA PROGRAM

ATTACHED AS A SEPARATE DOCUMENT

**RFCSP EXHIBIT 2**  
**REQUIREMENTS TRACEABILITY MATRIX (RTM)**  
**ATTACHED AS A SEPARATE DOCUMENT**

**RFCSP EXHIBIT 3**

**COSA STATEMENT OF WORK (SOW)**

**ATTACHED AS A SEPARATE DOCUMENT**



RFCSP EXHIBIT 4

COSA TECHNOLOGY STANDARDS 2019

ATTACHED AS A SEPARATE DOCUMENT

**RFCSP EXHIBIT 5**

**ACCEPTABLE USE OF INFORMATION TECHNOLOGY (AD 7.4A)**

**ATTACHED AS A SEPARATE DOCUMENT**

RFCSP EXHIBIT 6

ACCESS CONTROL (AD 7.8d)

ATTACHED AS A SEPARATE DOCUMENT

**RFCSP EXHIBIT 7**

**COSA DATA SECURITY (AD 7.3a)**

**ATTACHED AS A SEPARATE DOCUMENT**

**RFCSP EXHIBIT 8**

**NON-CITY EMPLOYEE PROVISIONING GUIDE (v1.4, 12-8-2018)**

**ATTACHED AS A SEPARATE DOCUMENT**

**RFCSP EXHIBIT 9**  
**REIMBURSEMENT REPORTS (GR 1050-58 Rev. 2014-9)**  
**ATTACHED AS A SEPARATE DOCUMENT**

RFCSP EXHIBIT 10

COSA TESTING POLICY (v1.5, 5-16-19)

ATTACHED AS A SEPARATE DOCUMENT

RFCSP EXHIBIT 11  
COSA TESTING STRATEGY (v1)  
ATTACHED AS A SEPARATE DOCUMENT



**RFCSP EXHIBIT 12**

**ADMINISTRATIVE DIRECTIVE 1.73 – SCHEDULING ITEMS FOR CITY COUNCIL CONSIDERATION**

**ATTACHED AS A SEPARATE DOCUMENT**

**RFCSP EXHIBIT 13**

**AGENDA FOR PRESUBMITTAL CONFERENCE**

**ATTACHED AS A SEPARATE DOCUMENT**

**RFCSP EXHIBIT 14**

**SMALL BUSINESS ECONOMIC DEVELOPMENT ADVOCACY PRESENTATION**

**ATTACHED AS A SEPARATE DOCUMENT**

017 RFCSP ATTACHMENTS

RFCSP ATTACHMENT A, PART ONE

GENERAL INFORMATION FORM

1. **Respondent Information:** Provide the following information regarding the Respondent.  
(NOTE: Co-Respondents are two or more entities proposing as a team or joint venture with each signing the contract, if awarded. Sub-contractors are not Co-Respondents and should not be identified here. If this proposal includes Co-Respondents, provide the required information in this Item #1 for each Co-Respondent by copying and inserting an additional block(s) before Item #2.)

Respondent Name: \_\_\_\_\_  
(NOTE: Give exact legal name as it will appear on the contract, if awarded.)

Principal Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Telephone No. \_\_\_\_\_ Fax No: \_\_\_\_\_

Website address: \_\_\_\_\_

Year established: \_\_\_\_\_

Provide the number of years in business under present name: \_\_\_\_\_

Social Security Number or Federal Employer Identification Number: \_\_\_\_\_

Texas Comptroller's Taxpayer Number, if applicable: \_\_\_\_\_  
(NOTE: This 11-digit number is sometimes referred to as the Comptroller's TIN or TID.)

DUNS NUMBER: \_\_\_\_\_

Business Structure: Check the box that indicates the business structure of the Respondent.

- Individual or Sole Proprietorship. If checked, list Assumed Name, if any: \_\_\_\_\_  
 Partnership  
 Corporation. If checked, check one:  For-Profit  Nonprofit  
Also, check one:  Domestic  Foreign  
 Other. If checked, list business structure: \_\_\_\_\_

Printed Name of Contract Signatory: \_\_\_\_\_  
Job Title: \_\_\_\_\_

Provide any other names under which Respondent has operated within the last 10 years and length of time under for each:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Provide address of office from which this project would be managed:  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Telephone No. \_\_\_\_\_ Fax No: \_\_\_\_\_

Annual Revenue: \$ \_\_\_\_\_

Total Number of Employees: \_\_\_\_\_

Total Number of Current Clients/Customers: \_\_\_\_\_

Briefly describe other lines of business that the company is directly or indirectly affiliated with:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

List Related Companies:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. **Contact Information:** List the one person who the City may contact concerning your proposal or setting dates for meetings.

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Telephone No. \_\_\_\_\_ Fax No: \_\_\_\_\_

Email: \_\_\_\_\_

3. Does Respondent anticipate any mergers, transfer of organization ownership, management reorganization, or departure of key personnel within the next twelve (12) months?

Yes \_\_\_ No \_\_\_

4. Is Respondent registered with the Texas Secretary of State?

Yes \_\_\_ No \_\_\_ If "Yes", provide your registered filing number associated with your registration. The filing number is the unique 10-digit number assigned by the Secretary of State (SOS) to each business organization, name registration, or name reservation filed with the SOS.

\_\_\_\_\_  
\_\_\_\_\_

5. Where is the Respondent's corporate headquarters located? \_\_\_\_\_

6. **Local/County Operation:** Does the Respondent have an office located in San Antonio, Texas?

Yes \_\_\_ No \_\_\_ If "Yes", respond to a and b below:

- a. How long has the Respondent conducted business from its San Antonio office?

Years \_\_\_\_\_ Months \_\_\_\_\_

- b. State the number of full-time employees at the San Antonio office.

If "No", indicate if Respondent has an office located within Bexar County, Texas:

Yes \_\_\_ No \_\_\_ If "Yes", respond to c and d below:

- c. How long has the Respondent conducted business from its Bexar County office?

Years \_\_\_\_\_ Months \_\_\_\_\_

d. State the number of full-time employees at the Bexar County office. \_\_\_\_\_

**7. Debarment/Suspension Information:** Has the Respondent or any of its principals been debarred or suspended from contracting with any public entity?

Yes \_\_\_ No \_\_\_ If "Yes", identify the public entity and the name and current phone number of a representative of the public entity familiar with the debarment or suspension, and state the reason for or circumstances surrounding the debarment or suspension, including but not limited to the period of time for such debarment or suspension.

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**8. Surety Information:** Has the Respondent ever had a bond or surety canceled or forfeited?

Yes \_\_\_ No \_\_\_ If "Yes", state the name of the bonding company, date, amount of bond and reason for such cancellation or forfeiture.

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**9. Bankruptcy Information:** Has the Respondent ever been declared bankrupt or filed for protection from creditors under state or federal proceedings?

Yes \_\_\_ No \_\_\_ If "Yes", state the date, court, jurisdiction, cause number, amount of liabilities and amount of assets.

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**10. Disciplinary Action:** Has the Respondent ever received any disciplinary action, or any pending disciplinary action, from any regulatory bodies or professional organizations? If "Yes", state the name of the regulatory body or professional organization, date and reason for disciplinary or impending disciplinary action.

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**11. Previous Contracts:**

a. Has the Respondent ever failed to complete any contract awarded?

Yes \_\_\_ No \_\_\_ If "Yes", state the name of the organization contracted with, services contracted, date, contract amount and reason for failing to complete the contract.

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b. Has any officer or partner proposed for this assignment ever been an officer or partner of some other organization that failed to complete a contract?

Yes \_\_\_ No \_\_\_ If "Yes", state the name of the individual, organization contracted with, services contracted, date, contract amount and reason for failing to complete the contract.

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c. Has any officer or partner proposed for this assignment ever failed to complete a contract handled in his or her own name?

Yes \_\_\_ No \_\_\_ If "Yes", state the name of the individual, organization contracted with, services contracted, date, contract amount and reason for failing to complete the contract.

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## REFERENCES

**Provide three (3) reference letters from three (3) separate organizations/companies/firms, that Respondent has provided services to within the past three (3) years.** The contact person named should be familiar with the day-to-day management of the contract and be willing to respond to questions regarding the type, level, and quality of service provided. In addition, ***please provide the contact information below of the references you have submitted.***

**Reference No. 1:**

Firm/Company Name \_\_\_\_\_

Contact Name: \_\_\_\_\_ Title: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Telephone No. \_\_\_\_\_ Fax No: \_\_\_\_\_

Date and Type of Service(s) Provided: \_\_\_\_\_

**Contact Email Address:** \_\_\_\_\_

**Reference No. 2:**

Firm/Company Name \_\_\_\_\_

Contact Name: \_\_\_\_\_ Title: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Telephone No. \_\_\_\_\_ Fax No: \_\_\_\_\_

Date and Type of Service(s) Provided: \_\_\_\_\_

**Contact Email Address:** \_\_\_\_\_

**Reference No. 3:**

Firm/Company Name \_\_\_\_\_

Contact Name: \_\_\_\_\_ Title: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Telephone No. \_\_\_\_\_ Fax No: \_\_\_\_\_

Date and Type of Service(s) Provided: \_\_\_\_\_

**Contact Email Address:** \_\_\_\_\_



## RFCSP ATTACHMENT A, PART TWO

### EXPERIENCE, BACKGROUND, QUALIFICATIONS

Prepare and submit narrative responses to address the following items. If Respondent is proposing as a team or joint venture, provide the same information for each member of the team or joint venture. When answering the next six questions please be detailed and specific in how you document your experience, background, and qualifications as it relates to each of the five core areas of this RFCSP. These answers will be used by the evaluation committee to understand exactly how the proposed solution will fit in the existing environment. Specifically, refer to RTM to so that your response highlights how the functional requirements align with your experience, background, and qualifications.

1. Describe Respondent's experience relevant to the Scope of Services requested by this RFCSP. List and describe three relevant projects of similar size and scope performed over the past four years. (These may be the same projects identified in References.) Identify associated results or impacts of the project/work performed. Scope of relevant projects must have addressed management of constituents/residents, boards and commissions, meetings, calendars and/or surveys.
2. Indicate the number of years Respondent has been in the business of providing the types of solutions for the relevant scope areas (constituents/residents, boards and commissions, meetings, calendars and/or surveys). Indicate if this is the Respondent's primary line of business. If not, state the Respondent's primary line of business.
3. If Respondent is proposing as a team or joint venture or has included sub-contractors, describe which components will be subcontracted and how communication and integration will occur between all parties.
4. List all Resident Connection Platform (or any individual components) integrations that Respondent has in progress as of the proposal due date. For each project listed, give the target date of completion, and the contact name, phone number, and email address for the agency's project manager.
5. Describe Respondent's specific experience with public clients, especially large municipalities, large non-profits, or counties. If Respondent has provided services for the City of San Antonio in the past, identify the name of the project and the department for which Respondent provided those services.
6. Has Respondent's proposed solution undergone user experience testing? If so, please provide a representative sample of user feedback for each relevant project.

## RFCSP ATTACHMENT A, PART THREE

### PROPOSED PLAN AND SOLUTION

Prepare and submit responses to address the following items.

- A. Executive Summary** – Maximum of five pages in length. The Respondent shall outline in narrative form its understanding and ability to provide the solution and perform the services as outlined in Section 004, Scope of Service, including summarizing the proposed solution and approach and highlighting relevant experience and staff qualifications.
- B. Proposed Solution.**
  1. The Respondent shall describe the proposed solution to provide a Resident Connection Platform as specified in the Scope Section 004, Project Management Testing and Quality Assurance, Accessibility, Documentation and

Knowledge Transfer, Training, Warranty Period, and in compliance to Exhibits 2-11. Provide a narrative response to the following items:

- a. Describe the process, steps, and timing to implement a Resident Connection Platform. Respondent can provide diagrams, tables, etc. to describe the proposed solution.
  - b. Describe the capabilities of the proposed solution and how they meet the City's requirements.
  - c. Describe how the system can accommodate more users over time and meet requirements to be scalable.
  - d. Is this proposal from a single vendor or partnership? If a partnership, please identify which vendor will serve in the role of a prime.
  - e. How will this solution be made available in other languages?
  - f. How will this platform be made available to residents via a mobile device?
  - g. How does this platform address use by individuals with disabilities?
  - h. How will we be able to measure success with this platform? What metrics can be tracked? How can we access reporting and reporting dashboards?
  - i. How will we be able to measure satisfaction and sentiment?
2. Provide an overview and detailed description of functionality of the CONSTITUENT MANAGEMENT component. In addition to the description, please provide a narrative to how this component works. Please include the perspective of the constituent or resident as well as the City employee and Council Office. Be sure to include how requirements from the RTM are met.
  3. Provide an overview and detailed description of functionality of the BOARDS AND COMMISSIONS component. In addition to the description, please provide a narrative to how this component works. Please include the perspective of the constituent as well as the City employee and Council Office. Be sure to include how requirements from the RTM are met.
  4. Provide an overview and detailed description of functionality of the MEETING MANAGEMENT component. In addition to the description, please provide a narrative to how this component works. Please include the perspective of the constituent as well as the City employee and Council Office side. Be sure to include how requirements from the RTM are met.
  5. Provide an overview and detailed description of functionality of the CALENDAR MANAGEMENT component. In addition to the description, please provide a narrative to how this component works. Please include the perspective of the constituent as well as the City employee and Council Office side. Be sure to include how requirements from the RTM are met.
  6. Provide an overview and detailed description of functionality of the SURVEY MANAGEMENT component. In addition to the description, please provide a narrative to how this component works. Please include the perspective of the constituent as well as the City employee and Council Office side. Be sure to include how requirements from the RTM are met.
  7. Describe how workflows are integrated throughout the components.
  8. The Respondent shall describe how the proposed solution will integrate with City of San Antonio's existing enterprise application environment (including Lagan, Outlook 365, and Office 365). Specifically address the following"
    - a. Provide an architectural diagram of the proposed environment. The description should include, but not be limited to, the integration of workflow details, workflow status and workflow assignments.
    - b. Describe how functionality is delivered without customization, if applicable, and what components of the system will require development as part of the project.

- c. Describe the possible integration(s) among various applications, including social media platforms. This should describe the approach and process to integration and provide insight into how extensive that process is.
9. Describe overall security and access processes and controls. Specifically address how the system will incorporate the following:
  - a. Self-management for users on their profile and how the City can connect with that information.
  - b. Form of authentication (Single Sign On preferred).
  - c. Each department will have their own environment and be unable to access the data from other offices.
  - d. GPA will have administrative rights and be able to view data from all the offices
  - e. Administrative access to reporting and data for the entire system as well as the individual components/accounts
  - f. Describe capabilities of the master calendar with role-based permissions and event management tools.
10. Describe reporting functions, processes of the system, specifically:
  - a. Ability to import and export data as needed
  - b. Customizable reporting
  - c. Creation of possible sign-in forms for tracking/reporting
11. Describe the training that will be provided, naming the contents of the training class, length of training, days and times of training, facility and location, frequency of training at a minimum of 1x per year for onsite users and frequency of training for remote users and mode of training for remote users.
12. Describe support services, frequencies and levels, as per SLA requirements in the SOW and RTM.
13. Provide functional diagrams, system diagrams, and data diagrams in order for the City to evaluate how the proposed platform with fit within the City environment. Other diagrams deemed applicable may also be submitted.
14. Please provide any additional information Respondent wishes to be considered.
15. After being selected but prior to starting actual work, Respondent shall provide a Statement of Work (SOW) that satisfies the format and criteria in Exhibit 3 – Statement of Work template v 6.0. Respondent shall coordinate with ITSD to develop their SOW.

**RFCSP ATTACHMENT B**  
**PRICE SCHEDULE**  
**POSTED AS A SEPARATE DOCUMENT**

## RFCSP ATTACHMENT C

### CONTRACTS DISCLOSURE FORM

Complete and submit a Contracts Disclosure Form with the proposal. The Contracts Disclosure Form may be downloaded at:

<https://www.sanantonio.gov/Portals/0/Files/eforms/Atty/ContractsDisclosureForm.pdf>

1. Download form and complete all fields. All fields must be completed electronically prior to submitting the form.
2. All Respondents must include the following information in the required Contracts Disclosure Form at the time the original proposal is submitted:
  - a. names of the agency board members and executive committee members,
  - b. list of positions they hold as an individual or entity seeking action on any matter listed:
    - (1) The identity of any individual who would be a party to the transaction;
    - (2) The identity of any entity that would be a party to the transaction and the name of:
      - a. Any individual or entity that would be a subcontractor to the transaction;
      - b. Any individual or entity that is known to be a partner or a parent entity of any individual or entity who would be a party to the transaction, or any subsidiary entity that is anticipated to be involved in the execution of the transaction; and
      - c. The board members, executive committee members, and officers of entities listed above; and
    - (3) The identity of any lobbyist, attorney or consultant employed for purposes relating to the transaction being sought by any individual or entity who would be a party to the transaction.
  - c. names and titles of officers of the organization.
3. Click on the "Print" button and place the copy in your proposal response as indicated in the Proposal Checklist.

NOTE: It is recommended not to use Chrome browser to access this form. If you have difficulty accessing, please contact the Staff Contact Person identified on the Title page of this RFCSP.

RFCSP ATTACHMENT D

LITIGATION DISCLOSURE FORM

Respond to each of the questions below by checking the appropriate box. Failure to fully and truthfully disclose the information required by this Litigation Disclosure form may result in the disqualification of your proposal from consideration or termination of the contract, once awarded.

Have you or any member of your Firm or Team to be assigned to this engagement ever been indicted or convicted of a felony or misdemeanor greater than a Class C in the last five (5) years?

Yes \_\_\_ No \_\_\_

Have you or any member of your Firm or Team to be assigned to this engagement been terminated (for cause or otherwise) from any work being performed for the City of San Antonio or any other Federal, State or Local Government, or Private Entity?

Yes \_\_\_ No \_\_\_

Have you or any member of your Firm or Team to be assigned to this engagement been involved in any claim or litigation with the City of San Antonio or any other Federal, State or Local Government, or Private Entity during the last ten (10) years?

Yes \_\_\_ No \_\_\_

**If you have answered "Yes" to any of the above questions, please indicate the name(s) of the person(s), the nature, and the status and/or outcome of the information, indictment, conviction, termination, claim or litigation, as applicable. Any such information should be provided on a separate page, attached to this form and submitted with your proposal.**

**RFCSP ATTACHMENT E**

**VETERAN-OWNED SMALL BUSINESS PREFERENCE PROGRAM TRACKING FORM**

Posted as a separate document, if applicable.

## RFCSP ATTACHMENT F

### CERTIFICATE OF INTERESTED PARTIES (Form 1295)

Texas Government Code §2252.908, and the rules issued by the Texas Ethics Commission found in Title 1, Sections 46.1, 46.3 and 46.5 of the Texas Administrative Code, require a business entity to submit a completed Form 1295 to the City before the City may enter into a contract with that business entity.

Form 1295 must be completed online. It is available from the Texas Ethics Commission by accessing the following web address:

[https://www.ethics.state.tx.us/whatsnew/elf\\_info\\_form1295.htm](https://www.ethics.state.tx.us/whatsnew/elf_info_form1295.htm)

**Print and sign your completed Form 1295. Submit your signed Form 1295 with your response to this solicitation. Where requested to provide the name of the public entity with whom you are contracting, insert "City of San Antonio". Where requested to provide the contract number, provide the RFCSP number shown on the cover page of this solicitation (e.g. IFB 6100001234, RFO 6100001234 or RFCSP 6100001234).**

The following definitions found in the statute and Texas Ethics Commission rules may be helpful in completing Form 1295.

"Business entity" includes an entity through which business is conducted with a governmental entity or state agency, regardless of whether the entity is a for-profit or nonprofit entity. The term does not include a governmental entity or state agency. (NOTE: The City of San Antonio should never be listed as the "Business entity".)

"Controlling interest" means: (1) an ownership interest or participating interest in a business entity by virtue of units, percentage, shares, stock, or otherwise that exceeds 10 percent; (2) membership on the board of directors or other governing body of a business entity of which the board or other governing body is composed of not more than 10 members; or (3) service as an officer of a business entity that has four or fewer officers, or service as one of the four officers most highly compensated by a business entity that has more than four officers. Subsection (3) of this section does not apply to an officer of a publicly held business entity or its wholly owned subsidiaries.

"Interested party" means: (1) a person who has a controlling interest in a business entity with whom a governmental entity or state agency contracts; or (2) an intermediary.

"Intermediary," for purposes of this rule, means, a person who actively participates in the facilitation of the contract or negotiating the contract, including a broker, adviser, attorney, or representative of or agent for the business entity who:

(1) receives compensation from the business entity for the person's participation;

(2) communicates directly with the governmental entity or state agency on behalf of the business entity regarding the contract; and

(3) is not an employee of the business entity or of an entity with a controlling interest in the business entity.

Publicly traded business entities, including their wholly owned subsidiaries, are exempt from this requirement and are not required to submit Form 1295.



**RFCSP ATTACHMENT G**

**SIGNATURE PAGE**

Respondent, and co-respondent, if any, must complete City's Certified Vendor Registration (CVR) Form prior to the due date for submission of proposals. The CVR Form may be accessed at: <http://www.sanantonio.gov/purchasing/>

By submitting a proposal, whether electronically or by paper, Respondent represents that:

If Respondent is a corporation, Respondent will be required to provide a certified copy of the resolution evidencing authority to enter into the contract, if other than an officer will be signing the contract.

If awarded a contract in response to this RFCSP, Respondent will be able and willing to comply with the insurance and indemnification requirements set out in this RFCSP.

If awarded a contract in response to this RFCSP, Respondent will be able and willing to comply with all representations made by Respondent in Respondent's proposal and during Proposal process.

Respondent has fully and truthfully submitted a Litigation Disclosure form with the understanding that failure to disclose the required information may result in disqualification of proposal from consideration.

Respondent agrees to fully and truthfully submit the Respondent General Information form and understands that failure to fully disclose requested information may result in disqualification of proposal from consideration or termination of contract, once awarded.

To comply with the City's Ethics Code, particularly Section 2-61 that prohibits a person or entity seeking a City contract - or any other person acting on behalf of such a person or entity - from contacting City officials or their staff prior to the time such contract is posted as a City Council agenda item.

(S)he is authorized to submit this proposal on behalf of the entity.

Complete the following and sign on the signature line below. Failure to sign and submit this Signature Page will result in rejection of your proposal.

\_\_\_\_\_  
Respondent Entity Name

Signature: \_\_\_\_\_

Printed Name: \_\_\_\_\_

Title: \_\_\_\_\_

(NOTE: If proposal is submitted by Co-Respondents, an authorized signature from a representative of each Co-Respondent is required. Add additional signature blocks as required.)

Co-Respondent should answer any questions or provide any information directed specifically to Co-Respondent.

\_\_\_\_\_  
Co-Respondent Entity Name

Signature: \_\_\_\_\_

Printed Name: \_\_\_\_\_

Title: \_\_\_\_\_

**RFCSP ATTACHMENT H**  
**SUBCONTRACTOR/SUPPLIER UTILIZATION PLAN**  
**ATTACHED AS A SEPARATE DOCUMENT**

**RFCSP ATTACHMENT I**

**PROPOSAL CHECKLIST**

Use this checklist to ensure that all required documents have been included in the proposal and appear in the correct order.

Document	Initial to Indicate Document is Attached to Proposal
Table of Contents	
General Information Form RFCSP Attachment A, Part One	
Demonstrated Applicable Experience, Background and Qualifications RFCSP Attachment A, Part Two	
Proposed Plan and Solution RFCSP Attachment A, Part Three	
Price Schedule RFCSP Attachment B	
*Contracts Disclosure Form RFCSP Attachment C	
Litigation Disclosure Form RFCSP Attachment D	
*Veteran-Owned Small Business Preference Program Tracking Form RFCSP Attachment E	
*Certificate of Interested Parties (Form 1295) RFCSP Attachment F	
Proof of Insurability Insurance Provider's Letter Copy of Current Certificate of Insurance	
Financial Information	
*Signature Page RFCSP Attachment G	
Subcontractor/Supplier Utilization Plan RFCSP Attachment H	
Proposal Checklist RFCSP Attachment I	
Exhibit 2 – Requirements Traceability Matrix (RTM)	
Signed Addenda, if applicable	
One (1) <b>COMPLETE ELECTRONIC COPY</b>	

\*Documents marked with an asterisk on this checklist require a signature. Be sure they are signed prior to submittal of proposal.