

City of Mission Viejo, CA



Request for Proposals

Enterprise Land Management System

April 15, 2020

City of Mission Viejo
200 Civic Center
Mission Viejo, CA 92691



Request for Proposals

Land Management Software

The City of Mission Viejo (“City”) is evaluating new software to satisfy its Land Management application needs.

Response instructions are contained in **Sections 3, 4, 5, and 6** of this *Request for Proposals* (RFP) document.

Section 5 of the RFP contains feature/function and other information worksheets. Please complete these worksheets using the electronic forms (Excel format) and as directed in the RFP instructions.

The proposal should include all costs associated with training, implementation, hardware specifications, interface estimates, file-conversion assistance, custom modification estimates, annual maintenance, and support.

- ♦ Intent to propose notification is to be directed to David Meyer, Information Technology Project Manager, by email to project-lms@cityofmissionviejo.org no later than **April 24, 2020**.

Questions related to this RFP are to be directed, in writing, to David Meyer, Information Technology Project Manager, by email to project-lms@cityofmissionviejo.org no later than **May 4, 2020**. Only written questions submitted by email by the above stated date will be accepted. Questions will not be accepted by phone.

- ♦ Please submit your proposal by 4:00 PM local time (PST) **May 20, 2020** electronically (flash drive) and in hard copy, as follows:
- ♦ Printed: Three (3) copies sent to:

**David Meyer
Information Technology Project Manager
City of Mission Viejo
200 Civic Center
Mission Viejo, CA 92691**

Thank you for your participation. We look forward to reviewing your proposal.



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1. Project Objectives and Process

1. Purpose

This information was developed in a format to facilitate the preparation of a proposal in response to this RFP and the subsequent evaluation of that response.

The City currently utilizes FileMaker Pro for permit tracking and GoGov CRM for violations tracking. The goal of the City is to implement an integrated enterprise land management system utilizing best practices, automated workflow, online portal capabilities, mobile solutions and other modern technology.

The final decision will be based on various evaluation criteria, primarily how well the proposed solution will meet the City's overall functional requirements. The requirements noted in this RFP are designed to meet these objectives.

2. Objective

The objectives for this project are to:

- Replace the existing Land Management system.
- Improve and streamline operational/business processes, including the reduction of manual paper processes and redundant shadow systems.
- Improve automated workflows.
- Improve integrations between application systems.
- Adopt use of best business practices.
- Complete a successful implementation of the system on time and within budget.

The City is looking for the best overall solution to meet its current and future needs. It is understood that there are no perfect solutions and that the applicable vendor may vary in its capability to meet the City's overall system needs.

3. City Background

Mission Viejo is located in southern California approximately halfway between Los Angeles and San Diego, in the southern-most portion of Orange County commonly referred to as the Saddleback Valley. The City's current population is 96,434 making it the largest city in the Saddleback Valley and the ninth largest of the county's 34 cities.

The City of Mission Viejo is an 18 square-mile city. Although the City incorporated in 1988, the first homes in the community were built in the mid-1960's. It was developed as a master planned community by the former Mission Viejo Company. The City is best known for its recreational facilities and programs, and includes 42 park sites within its boundaries.

The City is governed under the Council-Manager form of government, with a five-member City Council elected at-large on a non-partisan basis. Council members serve staggered, four-year terms, with a three consecutive term limit. Council elections are held in November of even-numbered years. The Mayor is selected by the City Council from among its membership and serves a one-year term. The City Manager is appointed by the City Council to carry out the policies and direction of the City Council, oversee the day-to-day operations of the City and appoint the heads of the various City departments. The current City Manager has served in that position since November 2003.

RFP for Land Management System

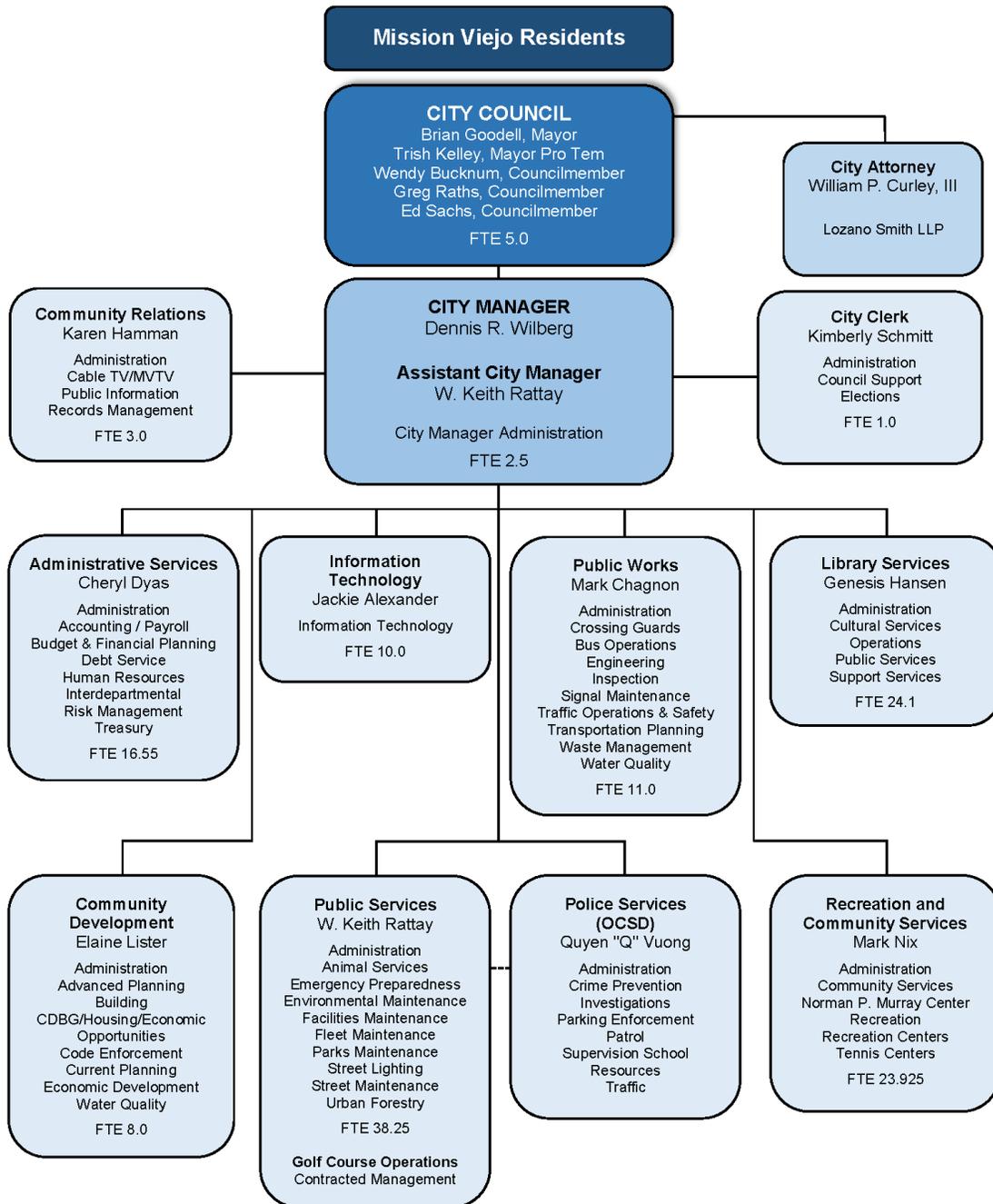


The City provides a full range of municipal services, including public works, planning, building, recreation, library and animal control. However, Mission Viejo is a "contract city," and contracts with other governmental entities, private firms and individuals to deliver many of these services. Police services are provided directly by Orange County Sheriff's Department, fire services are provided directly by the Orange County Fire Authority, and water and sewer services are provided by separate districts.



The City organization is summarized as follows:

City of Mission Viejo Organizational Chart





4. System Functionality Requirements

The City is looking for an integrated enterprise system, which is to include the following primary functionality (modules). This list is not intended to be all-inclusive/exclusive or organized by specific software modules.

Land Management

- Planning Projects
- Permitting
- Online Permitting
- Inspections
- Mobile Inspections
- Online Inspections
- Code Enforcement
- Online Complaint Tracking
- Parcel/Address Management

City Integrations/Interfaces (see Section 3.13 Integration/Interface Table for complete listing)

- GIS Integration
- Financial System
- Document Management System
- California State Licensing Board
- Etc.

The City seeks to install the system utilizing the vendor to provide all services, including software, installation, process discovery, training, project management, interfaces, conversion assistance, maintenance, and support. Applicable hardware specifications with sizing documentation should also be provided.



5. Process and Schedule

The process is for the City to review the proposals, evaluate the solutions, and finalize a project scope of work. Using subsequent interviews, demonstrations, reference checks, and/or site visits, the City will then make a final decision.

The following is the current estimated timeline:

Selection Process Step	Estimated Date(s)
Release and Issuance of the <i>Request for Proposal</i> (RFP)	April 15, 2020
Notification by Vendors of Intent to Respond	April 24, 2020
Final Date for Vendors to Submit Questions	May 4, 2020
Date for Publishing Answers to Vendors' Questions	May 7, 2020
Proposals Due	May 20, 2020
Decision on Vendor Finalists (short-list)	June 2020
Demonstrations by Vendor Finalists	June 2020
User Site Visits/Reference Checks	June/July 2020
Final Vendor Selection	June/July 2020
Contract Negotiations Process	July/August 2020



2. Evaluation Criteria

The City reserves the right to select the vendor who best meets the overall needs of the City, based primarily on the following criteria (not listed in any order of importance):

- The overall capability to provide the required software features and capabilities
- The flexibility of the application software, including the availability of tools to allow the novice user to “drill down and across” and perform ad hoc analysis and reporting
- The amount of vendor support that will be available for installation, conversion, training, ongoing modifications, and software support
- The total costs of the system over a ten-year period, including direct and indirect costs
- The vendor's performance record to date in meeting the requirements of their existing customers, including the availability of users similar to the City to allow reference investigation
- The expandability of the proposed solution, including the ease of upgrading the proposed system by adding components to accommodate future needs
- Adherence to the requested information specifications and thoroughness of the proposal, as well as the overall format of the presentation
- The financial stability, longevity, and strength of the vendor
- Corporate direction (potential organizational/industry restructurings, mergers, acquisitions, etc.)
- Future technology direction (major changes in architecture, database, platforms, languages, etc.)
- The internal controls provided within the system which prevent unauthorized access to data and provide adequate audit trails
- The capability to perform required conversions of existing data files
- The seamless integration of the various system modules and ability to meet the interface/integration requirements noted in this RFP
- Ease and intuitive use of software interface (for both internal staff and web customers)
- Availability and ease of use of mobile and online applications
- Ability to meet contract requirements



3. Specific Response Requirements

Include the following items in the order listed below (and indexed in the same manner) in your response to this Request for Proposals (RFP).

During the assessment phase of the project, key issues were discussed regarding alternate information management solutions. Following is a list of specific concerns of the City. Please respond to each issue in detail regarding how the proposed solution will satisfy each concern.

1. Programming Languages

Please provide information on all programming languages and technology platforms used for each proposed application/module.

2. Operating Systems

Please provide a description of all proposed server and desktop operating systems used by each of your products, applications, and modules and describe which server software option is being proposed (include server software name, year, and version).

3. Database

The City expects the information system to be based on a very stable and flexible relational database standard. The City's preference is MS SQL. Please briefly describe the relational database platforms available in the use of your products and which database option(s) are being proposed (include database management system name, year, and version).

4. User Interface Configurations

The City desires to move forward with advancing technologies and therefore prefers a solution that is browser-user interface (BUI), .Net, HTML5, etc. Screen-scraping technology configurations will not be considered. Please describe your client architecture.

5. Reporting Capabilities

Please provide information on overall system/solution reporting capabilities (e.g., canned reports, financial reporting, ad hoc reporting, executive dashboard, etc.)

6. Electronic Content Management Capabilities

Please provide information on your content management capabilities and options, including integration to third-party ECMS solutions. If your solution offers standard integration with any ECMS solutions, please list them and describe the integration capabilities.

7. Application Security

Please describe application and user security features/capabilities. Indicate any special security features (e.g., user security, function security, file security, field-level security, etc.) provided by the software. Please also confirm your support of Active Directory, single sign-on, and two-factor authentication capabilities.



8. Application Software Functionality Requirements

Please complete the Software Features, Functions, and Capabilities Listing contained in the electronic file provided with the RFP Section 5 (Appendix A).

The proposed software should demonstrate an online, integrated method of processing the noted application modules and allow for immediate update of all information. Access to information in either summary or detail should be obtained easily and intuitively. The proposed software’s data entry screens should be designed to facilitate rapid data entry.

For each application software module proposed, indicate whether your organization developed the module, or if the module is available because of a third-party relationship that has been established with another vendor.

In addition to the required and optional software information requested in Section 5, provide general information on other application modules not requested in this RFP which may be of interest or benefit to the City.

9. Software Upgrades

Please describe your software versioning and update policies/practices. Include, at a minimum, how often you issue updates (new versions) and whether new versions are provided as part of your annual maintenance and support fees. Please explain process of installing update patches and service packs. Please provide costs related to the following upgrade items.

Upgrade Types	Typical Frequency (in months)	Typical Vendor Assistance Cost		Typical Vendor End-User Training	
		Low Cost	High Cost	Low Cost	High Cost
Version Upgrades					
Major Upgrades					
Minor Upgrades					



10. User-Access Requirements by Module

The following table lists the City's estimated number of Full and Inquiry user-access requirements by module. These are not separate user IDs. Many users work in multiple modules. For overall total user counts, please see "User Information" under section *Volumes and Conversions*. ***NOTE: Most of these are duplicate users. This information is intended to give the vendor an understanding of the number of users involved in implementation and/or training.***

Module	Full Access	Inquiry Access	Total
<i>Land Management</i>			
Planning	13	5	18
Permitting	17	10	27
Inspections	12	5	17
Mobile Inspections	7	5	12
Code Enforcement	10	5	15
Parcel Address/Management	5	35	40
<i>Other</i>			
GIS Module/Map Viewer	20	10	30
Electronic Plan Review	15	5	20
Cashiering	15	5	20
CRM	25	5	30
Ad Hoc Reporting	10	30	40



11. Hosted/SaaS Model

If your solution can only be deployed in an on-premise environment, complete “Appendix G1 – On-Premise Project Costs.”

If your solution can only be deployed as a hosted/SaaS environment, complete “Appendix G2 – Cloud/Hosted Project Costs.”

Note: Both appendices G1 and G2 must be completed if the solution can be deployed as both hosted and on-premise.

12. Hardware Requirements

Please provide all hardware specifications, including servers, workstations, and other equipment. Include estimated costs (if applicable) in **Section 5 (Appendices G-1 and G-2)**.



13. Integration/Interface Capabilities

The City is expecting to expand its integration and interfaces with key systems. Please describe any current capabilities, partnerships, or future considerations for the following types of applications/systems.

Below are specific integrations the City currently utilizes and/or need in the future:

Module Requiring Interface/Integration	Third-Party Software (Software Name and Version)	Interface Direction(s)	Frequency / Real-Time Active	Integration Type	Description
Parcel/Address Management	WMTS Server	One-Way <input checked="" type="checkbox"/> Two-Way <input type="checkbox"/>	Each Month <input checked="" type="checkbox"/>	Import/Export Routine <input checked="" type="checkbox"/> Built-In Integration <input type="checkbox"/>	IMPORT OF ASSESSOR'S OR OTHER PARCEL INFORMATION - Provide for the establishment and periodic update of County Assessor's database.
Parcel/Address Management	ESRI ArcGIS Online or WMTS Server	One-Way <input checked="" type="checkbox"/> Two-Way <input type="checkbox"/>	As Needed <input checked="" type="checkbox"/>	Import/Export Routine <input type="checkbox"/> Built-In Integration <input checked="" type="checkbox"/>	MAP VIEWER INTEGRATION – Provide for an integration to the City maps via a viewer with the ability to select a parcel and view all related activity on that parcel within the viewer.
Permitting Planning Code Enforcement Inspections	Munis v2020.0.01	One-Way <input checked="" type="checkbox"/> Two-Way <input type="checkbox"/>	As Needed <input checked="" type="checkbox"/>	Import/Export Routine <input checked="" type="checkbox"/> Built-In Integration <input type="checkbox"/>	FINANCIAL EXPORT - Ability to automatically or manually generate an export file based on user parameters containing General Ledger transactions collected in the Land Management system.
Permitting and Planning	Electronic Plan Submittal	One-Way <input type="checkbox"/> Two-Way <input checked="" type="checkbox"/>	As Needed <input checked="" type="checkbox"/>	Import/Export Routine <input type="checkbox"/> Built-In Integration <input checked="" type="checkbox"/>	ELECTRONIC REVIEWS – Ability to integrate to an electronic plan review software. Please provide the vendors you integrate to.
Ad Hoc Reporting	3rd Party Reporting Software	One-Way <input checked="" type="checkbox"/> Two-Way <input type="checkbox"/>	Real-Time (Live) <input checked="" type="checkbox"/>	Import/Export Routine <input type="checkbox"/> Built-In Integration <input checked="" type="checkbox"/>	THIRD PARTY REPORT WRITERS - Ability to integrate with third-party report writing tools, such as SSRS, Crystal Reports and Cognos.



Module Requiring Interface/Integration	Third-Party Software (Software Name and Version)	Interface Direction(s)	Frequency / Real-Time Active	Integration Type	Description
Permitting Planning Code Enforcement Inspections	OnBase Foundation v19	One-Way <input type="checkbox"/> Two-Way <input checked="" type="checkbox"/>	Real-Time (Live) <input checked="" type="checkbox"/>	Import/Export Routine <input type="checkbox"/> Built-In Integration <input checked="" type="checkbox"/>	ELECTRONIC CONTENT MANAGEMENT SYSTEM – Land Management System must integrate with Electronic Document Management System.
Permitting Planning	California State License Board	One-Way <input checked="" type="checkbox"/> Two-Way <input type="checkbox"/>	Real-Time (Live) <input checked="" type="checkbox"/>	Import/Export Routine <input type="checkbox"/> Built-In Integration <input checked="" type="checkbox"/>	STATE LICENSES BOARD - Ability to extract contractor information from the state license board and populate fields in permit/planning modules and contractor database.
Cashiering	Online Payments	One-Way <input checked="" type="checkbox"/> Two-Way <input type="checkbox"/>	Real-Time (Live) <input checked="" type="checkbox"/>	Import/Export Routine <input type="checkbox"/> Built-In Integration <input checked="" type="checkbox"/>	ONLINE PAYMENTS - Ability to accept customer credit card payments online. Please provide the vendors you integrate to.
Cashiering	At the Counter	One-Way <input type="checkbox"/> Two-Way <input checked="" type="checkbox"/>	Real-Time (Live) <input checked="" type="checkbox"/>	Import/Export Routine <input type="checkbox"/> Built-In Integration <input checked="" type="checkbox"/>	OVER THE COUNTER PAYMENTS - Ability to accept customer credit card payments at the counter. Please provide the vendors you integrate to.
Gen Sys & Security	Email	One-Way <input checked="" type="checkbox"/> Two-Way <input type="checkbox"/>	Real-Time (Live) <input checked="" type="checkbox"/>	Import/Export Routine <input type="checkbox"/> Built-In Integration <input checked="" type="checkbox"/>	EMAIL - Sending emails from system utilizing standard SMTP protocols.
Gen Sys & Security	Active Directory	One-Way <input type="checkbox"/> Two-Way <input checked="" type="checkbox"/>	Real-Time (Live) <input checked="" type="checkbox"/>	Import/Export Routine <input type="checkbox"/> Built-In Integration <input checked="" type="checkbox"/>	SINGLE SIGN-ON - ACTIVE DIRECTORY - Support of Single-Sign-On and Active Directory.
Gen Sys & Security	Duo Security	One-Way <input type="checkbox"/> Two-Way <input checked="" type="checkbox"/>	Real-Time (Live) <input checked="" type="checkbox"/>	Import/Export Routine <input type="checkbox"/> Built-In Integration <input checked="" type="checkbox"/>	TWO FACTOR AUTHENTICATION – Support of Duo two-factor authentication (2FA) using SAML 2.0 or ADFS. If another form of 2FA is provided, please describe.



Module Requiring Interface/Integration	Third-Party Software (Software Name and Version)	Interface Direction(s)	Frequency / Real-Time Active	Integration Type	Description
Code Enforcement	GoGov CRM	One-Way <input type="checkbox"/> Two-Way <input checked="" type="checkbox"/>	Real-Time (Live) <input checked="" type="checkbox"/>	Import/Export Routine <input type="checkbox"/> Built-In Integration <input checked="" type="checkbox"/>	CODE CASE – Ability to create a new code case from a GoGov CRM complaint and also update that GoGov CRM Complaint based on code case status.



14. Cost Considerations

Initial one-time costs for hardware (if applicable), implementation, training, software licensing, travel, and related costs, etc., must be included with the price proposal. See electronic price proposal form **Section 5 (Appendices G1 and G2)**.

Recurring annual costs should be described in the proposal, clearly stating what is included (e.g., application upgrades, state and/or federal reporting requirements, hours of support, etc.), **Section 5 (Appendices G1, G2 and H)**. The City prefers unlimited telephone support. If 24/7 telephone support is available, price proposals should clearly indicate total recurring costs for that support option. If after-hours support is only available at an hourly rate, this should clearly be indicated.

The objective is to have **no hidden or unexpected costs**.

15. Mobile Field Computing

Please describe your solution's mobile field computing options, including full application access through wireless VPN connectivity (i.e., no vendor software required), mobile field application for use with laptops, or mobile field applications with use of tablets (e.g., iPads, Surface, etc.)

16. Telephone and Other Support

Please describe all support services available from your company in **Section 5 (Appendix B)**. Specifically address the following issues:

- Normal hours of availability
- Website support information
- Remote system access capabilities
- Quality assurance program(s) or procedures
- Other support services
- Service-Level Agreements (SLA) – Response time (by priority or severity levels), escalation processes, and other metrics



17. Implementation Methodology

Please describe your implementation methodology with milestones and timeframe. **Include a preliminary implementation schedule** for all applications, including the required time for system and application training, program testing, and conversion. Please include how you expect to sequence the installation of the various applications or application groupings.

18. Conversion Costs

The City anticipates electronic data conversions, depending on cost. Please include an estimated range of costs for data conversions for each application, if available, and a description of data that would be typically converted. Costs for proposed data conversion are to be included (**Section 5, Appendix I**).

19. Training and Education

Please provide your consulting and training options, including classroom (on-site and off-site), online (group and self-paced), training videos, and manuals. Include training for all required staff and users. Include ongoing training and user support group training options.

20. Project Management

The City will provide a designated project manager and expects the vendor to do the same. Please include recommended vendor project management costs (**Section 5, Appendices G1 and G2**) in the proposal and **describe, in detail, services to be provided**. The City reserves the right to accept or reject changes in vendor project management personnel.

21. Subcontractor and Third-Party Relationships

Please describe any subcontractor relationships and/or third-party providers that will be used for this implementation.

Note: If a vendor chooses to partner with a third-party vendor to address some requirements, this must be clearly stated in the response. Be specific when describing applications and the third-party vendor-solution provider. Third-party vendors will be required to demonstrate their portion of the application solution along with all other required information being provided by the prime vendor.

22. Customer Implementation Responsibilities

Please describe and/or provide a list of the typical customers' implementation responsibilities versus what the vendor provides.

23. Vendor/Reseller Information

Please provide all information related to your company as requested in RFP **Section 5 (Appendices B through E)**. In addition, specifically address the following issues:

- Describe your research-and-development approach and process.
- If you are a software reseller/partner, please provide the same company, customer demographics, and reference information for your specific company in addition to the software vendor's information (see Section 5, Appendices B, C, D, and E).



- If your proposed solution belongs to a parent/consolidation company, only provide customer base figures and references for the proposed solution (see **Section 5, Appendices D and E**).

24. Vendor Financial Information

Short-listed vendors may be required to provide copies of your organization's last three (3) years of audited financial statements, including any pending litigation, in a confidential manner to the City. Please **do not** send financial statements with your proposal.

25. User Groups

Provide information regarding organized user groups, including frequency and location of user group meetings. Also, indicate who conducts the meetings and who is responsible for establishing meeting agendas. Please also describe a local (state or regional) user groups or meetings.

26. References and User Base

Please provide references for a minimum of ten (10) completed projects of similar scope and nature to the City, **preferably within the same region** and within the last three (3) years.

A reference worksheet is provided in **Section 5 (Appendix E)**.

Please provide total number of customers (software provider and reseller, if applicable) for the applications according to the demographic request worksheet provided in **Section 5 (Appendix D)**.

If your proposed solution belongs to a parent/consolidation company, only provide customer base figures and references for the proposed solution (see **Section 5, Appendices D and E**).

Additionally, please provide an organization-name list of all active customers within the state of California. Contact information is not necessary.

Lastly, please provide the **number** of new customers (original go-lives) implementing the proposed applications in each of the last three (3) years.



4. Volumes and Conversions

The tables below summarize the estimated volumes of transactions and records associated with the application processing requirements and preliminary conversion requirements.

1. User License Information

Description ¹	Quantity
Concurrent Users	25
Unique Full-User ID Licenses	40
Unique Inquiry-Only User ID Licenses	15

¹See the table under the “User Access Requirements by Module” of Section 3 *Specific Response Requirements* for user access requirements by individual module.

2. Volumes Information

Volume Description	Quantity	Estimated Annual Transactions
LAND MANAGEMENT		
Address Count	Unknown	
Parcels Count	34,000	
Planning/Entitlement Projects (Active)		103
Permits (Building & PW)		5,285
Inspectors	7	
Inspections		Over 13,400
Code Enforcement Cases/Citations		Over 1,000
Code Officers	7	



3. Conversion Information

Application/Information	Existing Software Product		
	Name	Version	Database
Land Management			
Address/Parcel Records	WMTS Server		Geo Database
Active Planning Projects	Excel Spreadsheet		Excel Spreadsheet
Active Permit Applications	FileMaker Pro	10.0.2.206	FileMaker
Active Code Cases	GoGov CRM		Hosted Database
Active Encroachment Permits	Encroachment Spreadsheet		Excel Spreadsheet
Historical Planning Projects (43 Yrs.)	Excel Spreadsheet		Excel Spreadsheet
Historical Permit Records (23 Yrs.)	FileMaker Pro	10.0.2.206	FileMaker
Historical Inspections (23 Yrs.)	FileMaker Pro	10.0.2.206	FileMaker
Historical Code Enforcement Cases (20 Yrs.)	GoGov CRM		Hosted Database
Historical Encroachment Permits (15 Yrs.)	Encroachment Spreadsheet		Excel Spreadsheet



5. Proposal Forms & Supporting Information

This section of the RFP explains the required proposal forms and other supporting information designed to assist the vendors in their response.

1. Vendor Electronic Response Files

The multi-tab Excel spreadsheet files contain all appendices listed below. *Appendices* must be filled-in and submitted using these electronic forms (multi-tab Excel files) and must also be printed and included in your proposal.

Mission Viejo CA LMS - RFP Feature/Function Requirements Appendix A file (Excel)

RFP Appendix A – Land Management/Function Workbook Tabs

Mission Viejo CA LMS - RFP Appendices B-J file (Excel)

<i>RFP Appendix B</i>	<i>Vendor Profile</i>
<i>RFP Appendix C</i>	<i>Vendor Financial Information</i>
<i>RFP Appendix D</i>	<i>Vendor Customer Base</i>
<i>RFP Appendix E</i>	<i>Vendor References</i>
<i>RFP Appendix F</i>	<i>Vendor General System</i>
<i>RFP Appendix G1</i>	<i>On-Premise Project Costs</i>
<i>RFP Appendix G2</i>	<i>Cloud/Hosted Project Costs</i>
<i>RFP Appendix H</i>	<i>Interface Costs</i>
<i>RFP Appendix I</i>	<i>Conversion Costs</i>
<i>RFP Appendix J</i>	<i>Modification Costs</i>



6. Proposal Instructions

This section outlines the information that is requested to be included in your proposal. Please include a table of contents at the beginning of your proposal clearly outlining the contents of each section.

1. General Proposal Instructions

Software features, functions, and capability information should also be submitted electronically using the forms and instructions contained in the RFP.

Response instructions are contained in **Sections 3, 4, 5, and 6** of the *Request for Proposals* (RFP) document.

Section 5 of the RFP contains feature/function and other information worksheets. Please complete these worksheets using the electronic forms (Excel format) and as directed in the RFP instructions. Effort has been made to keep the RFP and feature/function listing as brief as possible.

The proposal should include all costs associated with training, implementation, hardware specifications, interface estimates, file-conversion assistance, custom modification estimates, annual maintenance, and support.

- ◆ Intent to propose notification is to be directed to David Meyer, Information Technology Project Manager, by email to project-lms@cityofmissionviejo.org no later than **April 24, 2020**.
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David Meyer
Information Technology Project Manager
City of Mission Viejo
200 Civic Center
Mission Viejo, CA 92691

Requests for extension of the submission date will not be granted. Vendors submitting proposals should allow for normal mail or delivery time to ensure timely receipt of their proposal.

Responses to the *Specific Proposal Requirements* identified in **Section 3** **MUST** be completed and indexed appropriately. In addition, all forms and checklists identified in **Section 5** must also be included in your hard-copy response. Failure to include any of the requested information within your proposal may result in rejection/disqualification.



2. Proposal Format

Proposals should be made in accordance with the RFP format provided herein, with all blank spaces in the appendices properly filled in. Numbers shall be stated in whole dollars.

Please provide the following sections, as a minimum:

- **Executive Summary**
- **Understanding of Project Objectives**
- **Specific Proposal Requirements (see Section 3)**
- **Detailed Proposal and Contractual Requirements (including exceptions taken to any RFP requirement)**
- **Remaining Appendices not included in another section**

Proposals shall be addressed as indicated. A duly authorized official representing the vendor must sign all proposals.

Modification of proposals will be acceptable only if delivered in writing to the place of the proposal prior to the proposal due date and time. Should the vendor find discrepancies in the RFP, detect omissions from the RFP, or be in doubt as to the meaning of any point, it shall at once notify David Meyer, Information Technology Project Manager by email to project-lms@cityofmissionviejo.org. The City will then send written instructions/clarifications to all vendors. If the proposal and specifications are found to disagree after the contract is awarded, the City shall be the judge as to which was intended.

Vendors are prohibited from contacting any City officials or employees regarding this Request for Proposals. All questions must be directed, in writing, to David Meyer, Information Technology Project Manager by email to project-lms@cityofmissionviejo.org. Failure to comply with this provision may result in rejection/disqualification of your proposal.

No negotiations, decisions, or actions shall be executed by the vendor as a result of any discussions with any of the City officials, employees, and/or consultant. Only those transactions provided in written form from the City may be considered binding. In addition, the City will only honor transactions from vendors which are written and signed.

The City reserves the right to terminate the selection process at any time and to reject any or all proposals. The contract will be awarded to the vendor whose overall qualifications best meet the requirements of the City.

The City shall not be liable for any pre-contract costs incurred by interested vendors participating in the selection process.

The contents of each vendor's proposal to the City, including technical specifications for hardware and software, purchase and lease prices, and hardware and software maintenance fees, shall remain valid for a minimum of 120 calendar days from the proposal due date.

All proposals should include copies of all sample contracts for hardware (if applicable), systems software, application software, hardware maintenance (if applicable), and software support. Please note that all contracts will be subject to negotiation between the City and the selected vendor.

This RFP and the selected vendor's proposal, including all representations, warranties, and commitments contained in the proposal and related correspondence shall be contractual obligations included in the written final contract for services, equipment, and software.



7. Disclosures & Contractual Requirements

Please note that any exceptions to the following requirements, as well as other sections of this Request for Proposals, should be addressed in a separate section of the vendor’s proposal.

1. Addenda

Any addenda to the specifications contained in this RFP issued during the period between issuance of the RFP and receipt of proposals are to be considered covered in the proposal, and in awarding a contract, they will become a part thereof. The vendors shall acknowledge receipt of addenda in their proposal cover letter.

2. Rejection of Proposals

Proposals that are not prepared in accordance with these instructions to vendors may be rejected or disqualified. If not rejected, the City may request correction of any deficiency and accept the corrected proposal upon compliance with these instructions to proposing vendors.

3. Acceptance of a Proposal

Proposals submitted are offers only, and the decision to accept or reject will be based on the quality, reliability, capability, reputation, and expertise of the proposing vendors.

The City reserves the right to accept the proposal that is, in its judgment, the best and most favorable to the interests of the City, to reject the lowest-price proposal, to accept any item of any proposal, to reject any and all proposals, and to waive irregularities and informalities in any proposal submitted or in the RFP process, provided, however, that the waiver of any prior defect or informality shall not be considered a waiver of any future or similar defect or informality. Proposing vendors should not rely upon or anticipate such waivers in submitting their proposal.

4. Insurance

The Contractor shall maintain workers’ compensation and employer liability insurance during the life of this Agreement for all of its employees. The Contractor shall also maintain, during the life of this Agreement, such public liability, general liability and property damage insurance as shall protect its agents, servants, employees and any approved sub-contractor performing work covered by this agreement, from claims for damages for personal injury, including accidental death, as well as claims for property damages which may arise from operations under this Agreement, whether such operations be by itself or by any sub-contractor, or by anyone directly or indirectly employed by either of them. The amount of such insurance shall be at least for the limits specified below.

For the purpose of the Agreement, the Contractor shall carry the following types of insurance in at least the limits specified as follows:

Coverage	Limits of Liability
Workman’s Compensation	Statutory
Professional Liability/Errors & Omissions	\$1,000,000 per occurrence or claim



Coverage	Limits of Liability
Professional Liability/E&O Aggregate	\$2,000,000
Cyber Liability	\$1,000,000
Cyber Liability Aggregate	\$2,000,000
Employer’s Liability	\$1,000,000
General Liability Per Occurrence	\$1,000,000 Each Occurrence
General Liability Aggregate	\$2,000,000
Automobile Combined Single Liability Limit	\$1,000,000
Umbrella Liability – extends over general liability, auto liability, and employers liability	\$5,000,000

The Contractor shall furnish the City satisfactory proof of the insurance required herein with an insurance company acceptable to the City upon the execution of this Agreement, and the City shall be named as an additional insured party in such policies. For the general liability policy the City, its officers, officials, employees, agents, and volunteers shall be named as additional insureds directly on separate additional insured endorsement forms that cover both ongoing and completed operations.

5. Vendor Demonstrations

Vendors may be requested, at no cost to the City, to demonstrate the proposed software and hardware systems at a mutually agreeable date and site.

6. Qualifications

It is expected that the proposing vendor has the requisite experience, ability, capital, facilities, organization, and staff to enable the proposing vendor to perform the work successfully and promptly, and to commence and complete the work within the proposed price and time frame.

7. Acknowledgments

By submitting a proposal, a proposing vendor acknowledges and agrees to each of the following:

Reliance. The City is relying on all warranties, representations, and statements made by the vendors in their proposals.

Reservations of Rights. The City reserves the right to reject any and all Proposals, reserves the right to reject the lowest priced Proposal, and reserves such other rights as are set forth in the instructions to proposing vendors.

Acceptance. If a vendor’s proposal is accepted by the City, the vendor shall be bound by each and every term, condition, and provision contained in the Request for Proposal, the vendor’s proposal, and in the final contract to be negotiated between the selected vendor and the City.

Remedies. Each of the rights and remedies reserved to the City in this Request for Proposal shall be cumulative and additional to any other or further remedies provided in law or equity.

Severability. The provisions of this Request for Proposal shall be interpreted when possible to sustain their legality and enforceability as a whole. In the event any provision of this Request for Proposal shall be held invalid, illegal, or unenforceable by a court with jurisdiction in the State of Alabama, in whole or in part, neither the validity of the remaining part of such provision,

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nor the validity of any other provisions of this Request for Proposal shall be in any way affected thereby.

Amendments. No modification, addition, deletion, revision, alteration, or other change in this Request for Proposal shall be effective unless and until such change is reduced to writing and executed and delivered by the City to the prospective vendors.