



**REQUEST FOR PROPOSAL
LAND MANAGEMENT SYSTEM
(LMS)
and
IMPLEMENTATION
SERVICES**

Issue Date
September 8, 2020

Response Due Date/Time
2:00 PM PDT
Thursday, October 15, 2020

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1. RFP Overview

1.1 Purpose of RFP

The purpose of this RFP is to solicit responses from qualified vendors offering the functionality and features identified for the desired replacement of the City of Chino Hills's (City) current Land Management System (LMS). The City seeks a qualified firm (Proposer) with the experience, expertise, and qualifications to provide a fully integrated, proven state-of-the-art solution (*Future System*). The City will also be looking to partner with the selected vendor to provide the associated professional services to complete implementation. The City will complete a fair and thorough evaluation of vendor responses to this RFP.

The City is interested in a solution that provides all the functionality identified below by a single proposer. Detailed requirements are included in Appendix B, LMS Requirements. At a **minimum**, the proposed *Future System* should include the following integrated functionality and features:

- Planning
- Permitting
- Code Enforcement / Complaint Tracking
- Inspections (including building, planning and code enforcement)
- Business Licenses
- Inquiry and Reporting
- Applicant Online Portal (including public inquiries)
- GIS Integration
- Mobility
- Workflow, including Electronic Notifications
- Document Management and CMS Integration

In addition to the software functionality identified above, the City is seeking a Proposer to provide professional services that will ensure a successful implementation. The professional services should include the following:

- Project Management
- Software Installation and Configuration
- Business Process Review and Redesign
- Implementation Consulting
- Conversion Services
- Acceptance Testing Support
- Training
- Documentation
- Report Writing
- Software Maintenance and Support



The City is also interested in evaluating both on-premises solutions and alternative cloud-based service and support models. Proposers are encouraged to offer alternatives to the traditional license purchase approach. If alternatives are offered, the Proposer should clearly identify what is being offered and the pricing to allow the City to fully evaluate the offering as compared to the traditional licensing approach.

The City desires to initiate the project kick-off on or before **July 1, 2021** and is prepared to have City resources assigned and available to the project. The City is open to a phased approach that meets its business and operational needs.

1.2 RFP Timeline

Table 1, RFP Schedule of Events, identifies the RFP schedule that will be followed.

Table 1 – RFP Schedule of Events

RFP EVENT	DATE/TIME
City Issues RFP	Tuesday, September 8, 2020
Intent to Propose Responses (Recommended)	Tuesday, September 15, 2020
Deadline for Proposer Questions	Wednesday, September 23, 2020
City Responses to All Questions	Monday, September 28, 2020
Deadline for Proposal Submission	2:00 PM PDT Thursday, October 15, 2020
City Completes Evaluations	Friday, November 20, 2020
Finalist(s) Notified & Proof of Capabilities (POC) Packet Provided	Early December 2020
POC (Proof of Capabilities) Sessions	During Weeks of January 4 and/or January 11, 2021
Finalist Due Diligence	February, March 2021
Select Vendor	March, April 2021
Begin Contract Negotiations	April 2021
City Council Approval	May, June 2021
Award of Proposal & Contract Execution	June 2021
Project Kickoff	July 2021

Proposers should be aware that finalist(s) will be required to participate in a minimum of two (2) days of scripted POC sessions to allow staff to fully understand the proposed solution. The sessions will be attended by City subject matter experts, will focus on the functions deemed most critical to the City and will consist of vendors working through scenarios provided by the City.

The POC is not intended to be a generic demonstration of the application. Rather, it is designed to address specific product functionality concerns of the City. Proposers must be prepared to



invest the time and resources necessary to complete a successful POC and be considered for final selection. (Note: A determination will be made closer to the scheduled date of the POCs as to whether these sessions will be scheduled for onsite or remote delivery; the City will work with the selected vendor(s) to ensure the safety and well-being of all participants in light of the on-going COVID-19 health crisis.)

Please note the City might also request that Proposers clarify the capabilities of their solutions through follow-up conversations, emails or limited remote demonstrations of solution functionality (i.e. GoToMeeting/WebEx) prior to formal invitation to participate in the POC and selection.

The City reserves the right, at its sole discretion, to adjust this schedule as it deems necessary. Notification of any adjustment to the “RFP Schedule of Events” will be provided to all Proposers who comply with Section 1.7 Intent to Propose.

1.3 RFP Coordinator

All communications concerning this RFP must be submitted via email to the RFP Coordinator identified below. The RFP Coordinator will be the sole point of contact for this RFP.

Matt Jester, IT Manager
City Manager’s Office
14000 City Center Drive
Chino Hills, CA 91709
(909) 364 - 2651

mjester@chinohills.org

Proposers contact with anyone else in the City is expressly forbidden and may result in disqualification of the Proposer’s bid.

1.4 Proposal Preparation Costs

The City will not pay any costs associated with the preparation, submittal, or presentation of any proposal.

1.5 RFP Amendment and Cancellation

The City reserves the unilateral right to amend this RFP in writing at any time. The City also reserves the right to cancel or reissue the RFP at its sole discretion. If an amendment is issued, it will be provided to all Proposers complying with RFP Section 1.7 Intent to Propose. Proposers will respond to the final written RFP and any exhibits, attachments, and amendments.

1.6 Questions Pertaining to the RFP

Specific questions concerning the RFP should be submitted via e-mail to the RFP Coordinator (See RFP Section 1.3 RFP Coordinator) no later than the “Deadline for Proposer Questions” as identified in Table 1, RFP Schedule of Events, as identified in RFP Section 1.2 RFP Timeline. Proposer questions should clearly identify the relevant section of the RFP and page number(s) related to the question being asked.



Copies of all questions and the City's responses will be emailed to all Proposers complying with RFP Section 1.7 Intent to Propose.

1.7 Intent to Propose

Each Proposer who plans to submit a proposal should register by email with the RFP Project Coordinator (RFP Section 1.3 RFP Coordinator). The email should indicate the Proposer's intent to respond to this RFP. The email should include:

- ◆ Proposer name
- ◆ Name and title of Proposer main contact
- ◆ Proposer address, telephone number, facsimile number and email address

Submittal of the Intent to Propose email is highly recommended and necessary to ensure receipt of RFP amendments, responses to vendor questions, and other communications regarding the RFP. The Intent to Propose is not intended to bind Proposers to submitting a proposal.

1.8 Proposal Submittal

Proposals must be submitted no later than the "Deadline for Proposal Submission" as identified in Table 1, RFP Schedule of Events. Proposers assume the risk of the method of delivery chosen. The City assumes no responsibility for delays caused by any delivery service. A Proposer's failure to submit a proposal as required before the deadline may cause the proposal to be disqualified.

Proposers must submit in a sealed package:

- ◆ One (1) original, signed master RFP response, including the Pricing Response
- ◆ Twelve (12) copies of the RFP Response
- ◆ Twelve (12) copies of the Pricing Response under separate cover
- ◆ Two (2) electronic copies (a single .pdf file containing all submitted material is strongly encouraged), one file comprising the complete RFP response and one comprising the redacted RFP response
- ◆ One (1) redacted copy of the RFP Response for public requests for information, this copy should be clearly identified and should NOT contain any proprietary or confidential information
- ◆ One (1) electronic copy of the Pricing Response in Excel format (not a PDF copy)

The package should be clearly labeled as follows:

Matt Jester, IT Manager
City Manager's Office
Response for LMS and Implementation Services
Name of Proposer
Proposer's Address
Proposer's Contact Person
Proposer's Telephone Number



The proposal package should be mailed, couriered, or hand delivered to:

City of Chino Hills
City Clerk's Office
14000 City Center Drive
Chino Hills, CA 91709

All proposals must be received before the Deadline for Proposal Submission date as indicated in Table 1, RFP Schedule of Events. Proposals received after this time and date may be returned unopened. Postmarks will **not** be accepted as proof of receipt.

1.9 Public Records Law

Pursuant to California Government Code Section 6250, public records may be inspected and examined by anyone desiring to do so, at a reasonable time, under reasonable conditions, and under supervision by the custodian of the public record. All submitted proposals are subject to this code section. See RFP Section 7.18 Proprietary Information regarding proprietary response content.



2. City Overview

The City of Chino Hills is a general law city incorporated under California law in 1991. Chino Hills is well known for its high quality of life and beautiful rural atmosphere. The community has a population of 82,409 and boasts 3,000 acres of publicly owned open space, 44 parks, and 48 miles of trails.

Chino Hills' reputation is known in the national arena as well. The City of Chino Hills has been ranked 38th on Money magazine's 2019 list of the "100 Best Places to Live." According to the CNN/Money website, the list includes "the top 100 terrific cities that offer what American families care about most -- strong job opportunities, great schools, low crime, quality health care, plenty to do, and a true sense of community." Cities with a population between 50,000 and 300,000 were considered. Chino Hills has previously appeared on the list – ranked 68th nationally in 2005, and 34th in 2012.

The City operates under the City Council-City Manager form of government, with five elected Council Members. The City Manager is appointed by the Council, serves as the Council's chief advisor, and is responsible for all City personnel consisting of approximately 150 full time, 74 permanent part time employees and 50 seasonal staff persons. In addition, the City employs temporary, part time staff to augment the City's full-time staff.

Participating departments in current land management-related functions include:

- ♦ City Manager's Office: The City Manager is responsible for the implementation of policies and decisions made by the Council and makes recommendations regarding capital improvements, municipal financing, planning and growth, economic development, services, and programs. The City Manager's staff is responsible for risk management, grant administration, human resources and labor relations, community relations/public information, code enforcement, GIS, website administration and City TV3, neighborhood services, volunteer program, public safety, and Information Technology.
- ♦ Finance: The Finance Department recommends fiscal policies to City management and implements such policies. The Department provides fiscal support to all City departments and programs and ensures that the fiscal affairs of the City are effectively managed in accordance with the City's municipal code, policies, and state and federal statutes. The Department's responsibilities include preparation of the annual budget, generation of all periodic and annual financial reports, analysis, management of investment funds, and all other financial management activities. The Department also oversees Utility Customer Services (Water, Sewer, and Trash), and Purchasing.
- ♦ Community Development: The Community Development Department serves Chino Hills' residents and businesses by assisting, regulating, and preserving residential and commercial development within the City. The Department strives to maintain the aesthetic beauty of Chino Hills while enhancing the quality of life of its residents and ensuring public health, safety, and welfare within the City. The Department's responsibilities include City compliance with federal and state legislation related to housing, land use and development. The Department's divisions/activities include the



following: Planning, Development Services, Building and Safety, Economic Development, and supporting the Planning Commission.

- ◆ Public Works: The Public Works Department includes Administration, Engineering, Equipment Maintenance, Facilities Maintenance, Parks and Landscape Maintenance, Sanitation, Storm System Maintenance, Street Maintenance, and Water. Responsible for implementing the City's Capital Improvement Program (CIP) and Land Development projects, specific responsibilities include project management, engineering designs, technical oversight and reviews, construction drawings, contract preparation and administration, quality assurance and inspections, oversight of encroachment permits, and development entitlements.

The Public Works Department also has responsibility for the operation and maintenance of water and sewer service; water quality; and maintenance of vehicles, streets, facilities, 44 parks and 3,000 acres of publicly owned open space. Public Works areas of responsibility include: Emergency/After Hours service, Facilities, Graffiti Removal, NPDES, Parks and Landscape, Streets, Service Requests, and Utility Operations (Sewer and Water). Finally, the Department provides drainage and sewer master planning, pavement management, record drawings management, transportation permits, utility coordination for the City and support to the Public Works Commission.

Table 2, Overview of Current LMS Technology, below and continuing the next page, presents a consolidated list of the applications that support the City's land management services. The City's fee schedule may be found on the City's website at <https://www.chinohills.org/DocumentCenter/View/19495/Comm-Dev---Master-Fee-Schedule-FINAL-eff-7-1-20?bidId=>

Table 2 – Overview of Current LMS Technology

Vendor / Source	Product	Purpose
BQE Software	BillQuick	<ul style="list-style-type: none"> • Resource allocation calculations, tracking of hours expended against deposits <ul style="list-style-type: none"> ○ Planned to be incorporated into the City's Munis implementation
Cartegraph	GovPartner (Cartegraph)	<ul style="list-style-type: none"> • Building permit processing
CivicPlus	CivicPlus	<ul style="list-style-type: none"> • Code enforcement complaint submissions, case histories • Business License Directory
ESRI	ArcGIS Suite	<ul style="list-style-type: none"> • GIS layers include parcels, tracts, and zoning
Exigis	Exigis	<ul style="list-style-type: none"> • Insurance compliance tracking
HdL Companies	HdL	<ul style="list-style-type: none"> • Business license applications, renewals, and certificates
iWorQ	iWorQ	<ul style="list-style-type: none"> • Public Works Service Orders



Vendor / Source	Product	Purpose
Laserfiche	Laserfiche	<ul style="list-style-type: none"> Document Management / Repository
Microsoft	Access	<ul style="list-style-type: none"> Building permits dating prior to 2006 Encroachment permits application tracking, invoices, inspection forms, permit documents, active permit log Plan check tracking Bond tracking Cash Receipts
Microsoft	Excel	<p>The following list is not all-inclusive:</p> <ul style="list-style-type: none"> Planning/Building application / plan check tracking Planning/Building project number tracking Inspection request “run sheets” Code enforcement case tracking Wide/overweight permit tracking Daily deposit summary (permit and plan check fees) to be submitted to Finance for entry into Munis
Microsoft	Word	<ul style="list-style-type: none"> Permit Application Routing Form Permit Approval Forms Planning Review Comment Letters
Microsoft	Outlook	<ul style="list-style-type: none"> Planning review comments provided to project’s assigned Planner
Paymentus	Paymentus	<ul style="list-style-type: none"> Customer payment platform
Tyler	Cashiering	<ul style="list-style-type: none"> Cash receipts <ul style="list-style-type: none"> This has not yet been rolled out to the departments, but this may be included with the LMS implementation effort
Tyler	Munis	<ul style="list-style-type: none"> General ledger financial data for land management activities
San Bernardino County	Property Information Management System (PIMS)	<ul style="list-style-type: none"> Parcel, ownership data updated on a bimonthly basis
State of CA	California Environmental Reporting System (CERS)	<ul style="list-style-type: none"> Reporting of hazardous waste and hazardous materials data related to permits issued as well as related inspections, compliance, and enforcement
State of CA	Contractor State Licensing Board website	<ul style="list-style-type: none"> California contractor license and worker’s compensation verification



3. Project Objectives

The City seeks a proven, fully integrated (i.e., data entered in one proposed solution module is available / viewable as appropriate in other proposed solution modules) LMS solution. It is willing to modify existing business processes to accommodate best practices and will be looking to select a system that drives the implementation of those best practices. More specifically, the *Future System* should provide the following capabilities in terms of its user interface and other general system characteristics:

- ◆ Enhance operational effectiveness by making more timely, accurate and complete information available to citizens, the Mayor and City Council, City Manager, and other City personnel (i.e. dashboard, portal)
- ◆ Increase public access to information and services through online portals/modules
- ◆ Improve management and public policy decision making by increasing the ability to analyze data
- ◆ Allow for ongoing upgrades of technology to support current and future core functional needs
- ◆ Utilize and manage technology in a cost-effective manner
- ◆ Continual innovation to encourage implementation of best business practices (i.e. encourage streamlining and automation of standard business transactions, enhanced and on-line capabilities, etc.)
- ◆ Enhanced features and functionality to support increased automation and operational efficiencies (i.e. workflow, mobility, online application submission, integrated document management, etc.)
- ◆ Improved reporting and simplified staff access to planning, permitting, inspections and code enforcement data and information for self-serve access and activities
- ◆ Robust audit and transaction logging capabilities
- ◆ Regulatory compliance (such as PCI DSS) to protect personal identifying information and cardholder data, and to adhere to State and Federal mandated regulations
- ◆ An intuitive, consistent (within and across modules), well-designed and browser-based user interface
- ◆ Fully integrated system where data is only entered one-time (single points of data entry) to eliminate re-keying of information but available for viewing or update as appropriate across the functions of the *Future System*
- ◆ Ability to drill into a record view to the supporting source data and documents that have been added, and to drill across from a record into related data in other, integrated modules
- ◆ Processing of transactions in real-time, making data immediately available for inquiry and reporting
- ◆ Ability to easily export information directly to Excel, Adobe, and flat file formats, etc.
- ◆ City-defined fields, reports, hot keys, and business rules/workflows



- ◆ Ability to modify setup/configuration (i.e., setup codes, report parameters, etc.) without the assistance of the software provider
- ◆ Robust security capabilities with the ability to integrate to MS Active Directory and with the ability to apply security access by role, individual or member of group and apply rules for exception based on functions, departmental data, etc.
- ◆ Ability to define workflow by record-type (i.e., building permit application, code enforcement complaint, etc.) and department, applicable across all appropriate modules
- ◆ Ability to view and manage workloads, assignments, and related thresholds

Additionally, the *Future System* selection will take into consideration the following criteria:

- ◆ How does the system provide **Strategic Alignment** with the City's overall vision and goals?
- ◆ Does the system align with the **Technology Standards** of the City?
- ◆ Are the **Implementation Risks** clear?
- ◆ Does the **Financial Investment** over 5 years meet City budget constraints?
- ◆ Can the needs of the City be met with proposed **Commercial-off-the-Shelf** solution?
- ◆ Does system provide **Information Sharing, Transparency and Robust Reporting**?
- ◆ Does the vendor have a clear approach to achieve **User Buy-In**?



4. Background / Current Environment

Several systems, applications and manual processes are used to support the City's land management-related functions. The Cartegraph system currently supports the Building Services Division in the issuance of building permits, while other City permits are tracked in and issued from Microsoft Access. Code Enforcement complaints are tracked in Request Tracker, part of the City's CivicPlus system. Business licenses are managed under contract with HdL but with a manually updated business directory on CivicPlus. Additional information regarding current integrations, technology standards, and key business and operational volumes are included in the information that follows.

4.1 Technology Standards

Table 3, Technology Standards, identifies technology standards for the City. Proposers will be required to conform to these requirements or clearly articulate proposed alternatives.

Table 3 – Technology Standards

Technology	Current Standard
Database(s)	Microsoft SQL Server 2017,2019
Server OS	Windows Server 2019
Desktop OS	Windows 10
Server Hardware	HPE ProLiant
Desktop Hardware	Dell Optiplex 3040, 8GB RAM, 256GB SSD, i5
Laptop/Mobile Hardware	Microsoft Surface Laptop, Dell Latitude, Apple iPad
Office Productivity	Office 2019
Browser	Chrome
Email Server/Client	Office 365
Virtual Environment	VMWare ESXi
Storage Area Network (SAN)	HPE Nimble
Active Directory	Windows Server 2019
VPN	Fortinet Fortigate

4.2 Interfaces / Integrations

The City looks to identify best practices and have the new solution provide required functionality where possible; when not possible, the *Future System* should provide for integration to external systems supporting City requirements. An integration means an automated process where data inputs and outputs are shared within systems *in real time*. Automated process would mean that there is no manual intervention. Table 4, Required LMS Integrations, identifies the integrations that will be required and/or desired with the new land management system.



Table 4 – Required LMS Integrations

Vendor	Product	Purpose
ESRI	ArcGIS Suite	<ul style="list-style-type: none"> • GIS layers include parcels, tracts, and zoning
HdL	Business Licenses (outsourced)	<ul style="list-style-type: none"> • Business license registration and tracking • May be migrated to <i>Future System</i>, if requirements can be met • Automated data share with business license directory in CivicPlus
Laserfiche	Laserfiche	<ul style="list-style-type: none"> • Document Management for documents and forms saved through the land management system and finalized plans/documents from the Electronic Plan Review application
State of California	GeoTracker	<ul style="list-style-type: none"> • Planned implementation 2021 • Cal EPA / State Water Resources Control Board database and GIS providing online access to environmental data
San Bernardino County	Assessor's Office	<ul style="list-style-type: none"> • Property ownership data
State of California	CA State Licensing Board	<ul style="list-style-type: none"> • Validate professional licenses
State of California	CERS	<ul style="list-style-type: none"> • Environmental Reporting
Tyler	Munis, Tyler Cashiering	<ul style="list-style-type: none"> • General ledger financial data for land management activities • Permit payment receipts (Planned)

4.3 Business and Operational Metrics

Table 5, Business and Operational Metrics, provides Proposer with key information that will help promote an understanding of the current environment.

Table 5 – Business and Operational Metrics

Building Services	
Category	Metric (FY 2019 – 20 Projected)
Building Permits Issued	<ul style="list-style-type: none"> • 1,700
Dwelling Unit Permits Issued	<ul style="list-style-type: none"> • 71
Number of Plan Checks	<ul style="list-style-type: none"> • 800
Number of Building Inspections	<ul style="list-style-type: none"> • 5,776



Code Enforcement	
Category	Metric (FY 2019 – 20 Projected)
Code Complaints Received from the Public	• 1,946
Code Enforcement Cases Opened	• 1,240
Code Enforcement Cases Closed	• 950
Yard Sale Permits Issued	• 433
Parking Permits Issued	• 450
Development Services	
Category	Metric (FY 2019 – 20 Projected)
Entitlement Permit Applications Processed	• 78
Post-Entitlement Permit Applications Processed	• 24
OTC Permit Review/Approvals	• 206
Staff Entitlement/Post-Entitlement Review/Approvals	• 12
Home Occupation Permit Applications Processed	• 190
Business Licenses	• 2,380
Plan Checks	• 415
Public Works / Engineering	
Category	Metric (FY 2019 – 20 Projected)
Lot Line Adjustment / Lot Merger Reviews	• 8
Plan Checks	• 49
PRC Entitlement Reviews	• 4
Precise Grade Reviews	• 12
Encroachment Permits/Inspections – Utility	• 212
Encroachment Permits/Inspections - Development	• 18
Oversize Load Permits	• 36

4.4 Conversion

The City desires to retain, convert and load its current and historical data (including records, libraries, supporting documents, and related file attachment meta-data) to the *Future System*. Table 6, Conversion Requirements, provides a list of data by functional areas and a description.



Table 6 – Conversion Requirements

Current Repository	Description
Cartegraph	<ul style="list-style-type: none"> • Current and historical (since 2006) building permits and supporting documents
CivicPlus / Request Tracker	<ul style="list-style-type: none"> • Current and historical code enforcement cases and supporting documents
Microsoft Access	<ul style="list-style-type: none"> • Historical (prior to 2006) building permits and supporting documents • Current and historical encroachment permits and supporting documents • Plan check routing / tracking milestones
Microsoft Excel	<ul style="list-style-type: none"> • Wide/Overweight Permits issued • Permit fees paid • Planning Entitlement Case Numbers • Trust Account Numbers • Certificate of Occupancy/NOI Information • Grading and Soils Tracking Logs



5. Proposal Submission Requirements

5.1 General Instructions

The City discourages lengthy and costly proposals. Proposals should be prepared simply and economically and provide a straightforward, concise description of the Proposer's company, qualifications, proposed solution, and capabilities to satisfy the requirements of this RFP. Emphasis should be on completeness and clarity of content. Glossy sales and marketing brochures are not necessary or desired.

Proposals must be organized consistently with the outline provided in this section of the RFP. Proposers must follow all formats and address all portions of the RFP set forth herein providing all information requested. Proposers may retype or duplicate any portion of this RFP for use in responding to the RFP, provided that the proposal clearly addresses all of the City's information requirements.

5.2 Proposal Format

Proposals must be structured, presented, and labeled in the following manner:

- ◆ Cover Letter
- ◆ Table of Contents
- ◆ Section 1 – Executive Summary
- ◆ Section 2 – Company Background
- ◆ Section 3 – Company Qualifications
- ◆ Section 4 – References
- ◆ Section 5 – Proposed Solution
- ◆ Section 6 – Implementation Approach
- ◆ Section 7 – Other Requirements
- ◆ Section 8 – Pricing
- ◆ Section 9 – Software Licensing and Maintenance Agreements

Failure to follow the specified format, to label the responses correctly, or to address all of the subsections may, at the City's sole discretion, result in the rejection of the Proposal.

Proposals should be prepared on standard 8 1/2" x 11" paper and printed on 2 sides. All proposal pages should be numbered.

5.2.1 Cover Letter

The proposal must include a cover letter that provides the following:

- ◆ Proposer's legal name and corporate structure
- ◆ Proposer's primary contact to include name, address, phone, and email



- ◆ Identification of use of subcontractors and scope of work to be performed by subcontractors
- ◆ Identification of any pending litigation against the Proposer
- ◆ Disclosure of any bankruptcy or insolvency proceedings in last 10 years
- ◆ Statement of the Proposer's credentials to deliver the services sought under the RFP
- ◆ Statement indicating that the proposal remains valid for at least 120 days
- ◆ Statement that the Proposer or any individual who will perform work for the Proposer is free of any conflict of interest (e.g., employment by the City)
- ◆ Statement of acknowledgement that the City's legal documents have been reviewed and accepted with or without qualification. If qualifications are involved, those items requiring adjustment or modification must be identified and listed along with suggested modifications to the contract. If no modifications are noted, the City will assume that the proposer can perform all normal tasks and services without reservation or qualification to the contract
- ◆ Signature of a company officer empowered to bind the Proposer to the provisions of this RFP and any contract awarded pursuant to it

The Proposal Cover Letter should be concise and brief and not exceed two pages unless Proposer's exceptions to the City's legal documents require it.

5.2.2 Table of Contents

All pages are to be numbered and figures, tables, charts, etc. must be assigned index numbers and identified in the Table of Contents.

5.2.3 Section 1 - Executive Summary

This section of the proposal should provide a brief and concise synopsis of Proposer's proposal and a description of the Proposer's credentials to deliver the services sought under the RFP. The Executive Summary should not exceed 3 pages.

5.2.4 Section 2 – Company Background

This section of the proposal should identify the following:

- ◆ 2.1 – A brief description of the Proposer's company background and organizational history
- ◆ 2.2 – A statement of how long the Proposer has been performing the services required by this RFP
- ◆ 2.3 – Identify the location of headquarters, technical support, and field offices
- ◆ 2.4 – Identify the location of the office which would service the City
- ◆ 2.5 – Identify Proposer's annual company revenues and profit for the last three company fiscal years

The Background section should not exceed 3 pages.



5.2.5 Section 3 – Company Qualifications

In this section of the proposal, the Proposer should identify company qualifications and experience in implementing solutions similar to what the City is seeking:

- ◆ 3.1 – Describe the Proposer’s familiarity with land management systems and associated business processes, including experience with the requirements of the State of California (i.e., CERS).
- ◆ 3.2 – Identify the Proposer’s existing client base including the number of existing clients using the version / release of the software system being proposed. Clearly identify the number of California public agency installations.

The Company Qualifications section should not exceed 3 pages.

5.2.6 Section 4 - References

The Proposer must provide at least five references with at least three of the references for systems that have been implemented in the last five years. The City prefers references from California agencies of similar size and complexity to the City. For each reference, Proposer must provide the following information:

- ◆ Agency name and contact information (i.e. name, title, address, phone, and email)
- ◆ Brief project description, including identifying the software version and modules implemented
- ◆ Number of agency employees
- ◆ Agency general fund budget
- ◆ Implementation date
- ◆ Implementation timeline and cost

5.2.7 Section 5 - Proposed Solution

In this section of the proposal, the Proposer should identify the proposed solution up to and including the following:

- ◆ 5.1 – Provide a brief solution overview identifying origin of system, release history, current release being proposed, and number of operational installations for the proposed software solution.
- ◆ 5.2 – Provide a written description for each module included in the Proposal. It is important to note that the level of detail must be sufficient to allow the evaluators to understand your product’s features, functions, capabilities and shortcomings/challenges and to ensure an adequate understanding of how the proposed solution will meet the City’s needs. Proposers may supplement their response to Section 5 using additional product information as an attachment to their Proposal.
- ◆ 5.3 – Complete the LMS Requirements document (Appendix B) that has been provided in Microsoft Word format. The document should be completed for each line item based on the following criteria: Y – Meets/Exceeds, N – Does not Meet, W/C – Workaround or Customization Required, or T – Alternate / 3rd Party Solution Required. Proposer is to



respond with a single option and are encouraged to provide written response to adequately explain each response.

- ◆ 5.4 – Identify any additional functionality or recommended modules or services not already identified but that the Proposer recommends that the City consider. Include a description of the features and functions of each additional proposed module, service, or recommended 3rd party solution.
- ◆ 5.5 – Confirm ability to conform to the requirements in RFP Section 4.1 Technology Standards, or clearly articulate proposed alternatives.
- ◆ 5.6 – RFP Section 4.2 Interfaces / Integrations documents the City's required LMS integrations with a *Future System*, detailed in Table 4, Required LMS Integrations. Proposer's must identify the recommended method for integration for each identified system.
- ◆ 5.7 – RFP Section 4.4 Conversion describe the City's current conversion requirements; in this section of the Proposal, Proposers should describe their Conversion Methodology and approach to meet the City's desire to retain and convert data to the *Future System*, detailed in Table 6, Conversion Requirements. Proposer's should identify all involved activities and responsible party (i.e., vendor, City) for the tasks to complete a successful data conversion.

5.2.8 Section 6 - Implementation Approach and Work Plan

The Proposer should identify the proposed implementation approach, clearly identifying each phase, the timeline proposed, roles and responsibilities to be performed by the Proposer and those to be performed by the City. The Proposer response should be reflective of the City's timeline and approach for implementation and should clearly indicate the City resource requirements to meet the vendor proposed schedule.

- ◆ 6.1 – Describe your implementation and project management methodology and approach to ensure a successful implementation.
- ◆ 6.2 – Provide a project organization chart highlighting the key staff who will be assigned to the project. Provide biographies for the project manager and other assigned resources.
- ◆ 6.3 – Provide a detailed work plan that identifies major activities, tasks, deliverables, and resources. The work plan should assume that the project kickoff will be held during **July 2021** (or earlier, if possible).
- ◆ 6.4 – Describe the roles and responsibilities of the City staff during implementation, and provide an estimated number of City resources, expected role and level of effort during each phase of the project.
- ◆ 6.5 – Describe the conversion methodology that will be used to implement the *Future System*. In addition, recommend what the City should convert (content and how many years of history) from the current system.
- ◆ 6.6 – Describe your training methodology and how you ensure users are prepared to use the *Future System*.
- ◆ 6.7 – Describe how the use of any alternative service delivery models would impact the proposed implementation approach, work plan, and City staff level of effort.



5.2.9 Section 7 – Other Requirements

In this section of the proposal, the Proposers should address the following items in a concise manner:

- ◆ 7.1 – Describe ongoing maintenance, release/upgrade, and support services. At a minimum, Proposers should address the following items:
 - Help desk processes and procedures
 - Hours of support (stated in Pacific Standard Time)
 - Escalation procedures
 - Response time commitments
- ◆ 7.2 – Identify if there are solution user groups and / or user conferences
- ◆ 7.3 – Provide hardware and database specifications for the *Future System*. As part of Proposer’s response, confirm your acceptance of the City’s technical standards.
- ◆ 7.4 – Describe the frequency that application patches and releases have been made available within the past two years. In addition, clearly identify the roles and responsibilities of the City to complete updates.

5.2.10 Section 8 - Pricing

The City seeks a clear and comprehensive understanding of all costs associated with the *Future System*, including implementation and ongoing software maintenance / support fees. In this section, the Proposer must itemize all of those costs. The City will evaluate proposals based on the “Total Cost to Implement (TCI)” and the “Total Cost to Operate (TCO).” TCI will include all costs required for a successful implementation. The TCO will be calculated based on TCI plus five years of annual maintenance fees.

The Proposer’s price sheet(s) must identify all costs required to complete a successful implementation to include:

- ◆ Solution pricing
 - ◆ Software Licensing and Maintenance Costs
- ◆ Implementation Services
 - Software Installation and Configuration
 - Project Management
 - Business Process Review
 - Training
 - Documentation
 - Conversion
 - Change Management
- ◆ Interface Services
- ◆ 3rd party products required/recommended for *Future System* (i.e. software, hardware)
- ◆ Optional offerings



- ◆ Consultant travel and expenses not otherwise included in the implementation costs
- ◆ Professional Services rates

The City intends to purchase any required Future System hardware and database software independently based on recommended standards provided by the Proposer if required for proposed solution.

The City has provided Proposer a mandatory electronic (Microsoft Excel) spreadsheet with a pricing template **that must be filled out completely** and included in *native* format (**not** PDF) with the Proposer's response and under separate cover. The City will evaluate solution pricing based solely on the information provided in the pricing templates. The templates provide space for Proposer to identify any assumptions or comments necessary to ensure the City understands what is being proposed (please see Appendix C.)

The Proposer's response to the Pricing section must include completion of the following components:

- ◆ SW License and Maintenance Price Sheet – This section of the pricing proposal should clearly identify the proposed software modules that are required to meet the RFP requirements. Proposer is strongly encouraged to provide a detailed breakout of software module pricing to help the City assess the cost of the proposed solution. Proposer must identify the number of user licenses being proposed for each module and clearly describe the method used to justify number of licenses being proposed.
- ◆ Implementation Services Price Sheet – This section of the pricing proposal should clearly identify the quantity, hourly rate, and total cost for all professional services the Proposer will provide to ensure a successful implementation. Proposer is encouraged to provide a breakdown of the service categories that will be provided to support the implementation to allow evaluators to understand the level of effort, resources, and cost of services.
- ◆ Interface Services Price Sheet – This section of the pricing proposal should clearly identify the one-time and annual costs associated with providing the interfaces, exports and imports of data with other systems if not defined as part of the proposed solution.
- ◆ Conversion Price Sheet – This section of the pricing proposal should clearly identify the costs associated with data conversion from the existing systems to the *Future System*.
- ◆ 3rd Party Products Price Sheet – This section of the pricing proposal should clearly identify any 3rd party software and / or specialty hardware that will be required to fully implement the proposed solution to meet the RFP requirements. The City desires to include all 3rd party costs in the total project costs.
- ◆ Optional Price Sheet – This section of the pricing proposal should identify any optional product or service offerings the Proposer would like the City to consider. The City is interested in understanding and evaluating other products and services of the Proposer. If Proposer believes they have additional products and services that might be of interest to the City, please itemize that information in the Optional Offerings Price Sheet.
- ◆ Travel Price Sheet – This section of the pricing proposal should clearly identify the projected travel costs associated with Proposer's implementation services. The Proposer should identify the anticipated number of trips, days of service per trip, and estimated per trip cost. The City will reimburse the selected Proposer based on actual trip expenses supported by receipts and documentation.



- ◆ Professional Services Rate Price Sheet – The City seeks hourly pricing for additional services that may be required during the implementation. Proposer should provide an hourly rate for any professional services categories offered as part of the proposal. If necessary, the City will use these rates to purchase additional services.

5.2.11 **Section 9 – Software Licensing and Maintenance Agreements**

In this section, the Proposer must provide any software licensing and maintenance agreements that will be required to implement the Proposer's solution.



6. Proposal Evaluation

An Evaluation Committee shall review all proposals to determine which Proposers have qualified for consideration. The evaluation will include both an initial review and a detailed review. The initial review will evaluate all submissions for conformance to stated specifications to eliminate all responses that deviate substantially from the RFP's intent and/or fail to satisfy the mandatory requirements. Only those proposals that meet or exceed the mandatory requirements will be further evaluated.

Submitted proposals will be evaluated on the following criteria:

- ◆ Proposal submission follows the stated format and specifications for submittal
- ◆ Proposer understands the work required
- ◆ Quality, clarity, and responsiveness of proposal
- ◆ Ability to meet the identified needs and functionality required by the City
- ◆ Ability to provide the requested interfaces/integrations
- ◆ Commitment to continually evolving the system to remain current with evolving best practices
- ◆ Well thought out timeline and roadmap with a phased approach
- ◆ Proven technical ability to design, install, and support the proposed system
- ◆ Demonstrated ability to work in a cooperative and collaborative manner with clients
- ◆ Anticipated value and price
- ◆ Perceived risk or lack thereof
- ◆ Company financial stability
- ◆ Recent relevant references in successfully performing similar services in California
- ◆ Results of interviews, demonstrations, POC (proof of capabilities), and site visits
- ◆ Ability to prepare and execute a contract in a timely manner

The City will shortlist two or more vendors to continue with further evaluation using proof of capabilities (POC) sessions. The short list will be selected using the criteria identified above. Additional discovery may be performed to assist in selecting the short list vendors, including the use of remote product demonstrations. The short list vendors will be contacted regarding their status as short-listed vendors. The City reserves the right to award a contract, or to forego awarding, without notice.

If a short list of vendors is developed, the City will further evaluate short-listed vendors' solutions by utilizing POC scripted scenarios that will demonstrate the ability to meet all requirements stipulated in this RFP. Each short-listed vendor will be provided the scripted scenarios that they are to use to prepare for an on-site solution evaluation. The short-listed vendors will be further evaluated based on the results of reference checks, additional discovery and, at the option of the City, organized site visits at vendors' customer sites. Vendors will provide the City with a list of three (3) potential customer sites. Customer sites should be using the same major version of



the software being proposed to the City, similar in scope and complexity, and geographically close to City if possible.

Specific days and times for POC sessions for each short-listed vendor will be finalized at a later date, but vendors should be prepared to conduct the on-site participation with three weeks of notification. It is highly recommended that the proposed vendor Project Manager takes part in the on-site sessions.

As reflected above, contract award will not be based solely on price, but on a combination of factors determined to be in the best interest of the City. After evaluating the proposals and discussing them further with the finalists or the tentatively selected vendor, the City reserves the right to further negotiate the proposed work and/or method and amount of compensation.

The City reserves the right, at its sole discretion, to request clarifications of proposals or to conduct discussions for the purpose of clarification with any or all Proposers. The purpose of any such discussions shall be to ensure full understanding of the proposal. Discussions shall be limited to specific sections of the proposal identified by the City and, if held, shall be after initial evaluation of Proposals is complete. If clarifications are made because of such discussion, the Proposer shall put such clarifications in writing.



7. General Requirements

7.1 Collusion

By submitting a response to the RFP, each Proposer represents and warrants that its response is genuine and made in the interest of or on behalf of any person not named therein; that the Proposer has not directly induced or solicited any other person to submit a sham response or any other person to refrain from submitting a response; and that the Proposer has not in any manner sought collusion to secure any improper advantage over any other person submitting a response.

7.2 Gratuities

No person will offer, give, or agree to give any City employee or its representatives any gratuity, discount, or offer of employment in connection with the award of contract by the City. No City employee or its representatives will solicit, demand, accept or agree to accept from any other person a gratuity, discount or offer of employment in connection with a City contract.

7.3 Required Review and Waiver of Objections by Proposers

Proposers should carefully review this RFP and all attachments, including but not limited to the Standard Professional Services Agreement, for comments, questions, defects, objections, or any other matter requiring clarification or correction. Comments concerning RFP objections must be made in writing and received by the City no later than the "Deadline for Written Questions and Comments" detailed in Table 1, RFP Schedule of Events. This will allow issuance of any necessary amendments and help prevent the opening of defective proposals upon which contract award could not be made.

Protests based on any objection will be considered waived and invalid if these faults have not been brought to the attention of the City, in writing, by the Deadline for Written Questions and Comments.

7.4 Nondiscrimination

No person will be excluded from participation in, be denied benefits of, be discriminated against in the admission or access to, or be discriminated against in treatment or employment in the City's contracted programs or activities on the grounds of disability, age, race, color, religion, sex, national origin, or any other classification protected by federal or California State Constitutional or statutory law; nor will they be excluded from participation in, be denied benefits of, or be otherwise subjected to discrimination in the performance of contracts with the City or in the employment practices of the City's contractors. Accordingly, all Proposers entering into contracts with the City will, upon request, be required to show proof of such nondiscrimination and to post in conspicuous places, available to all employees and applicants, notices of nondiscrimination.



7.5 Proposal Withdrawal

To withdraw a proposal, the Proposer must submit a written request, signed by an authorized representative, to the RFP Coordinator (Section 1.3) up until the RFP submission deadline, according to Section 1.2 RFP Timeline. After withdrawing a previously submitted proposal, the Proposer may submit another proposal at any time up to the deadline for submitting proposals.

7.6 Proposal Errors

Proposer is liable for all errors or omissions contained in their proposal. Proposer will not be allowed to alter proposal documents after the deadline for submitting a proposal.

7.7 Incorrect Proposal Information

If the City determines that a Proposer has provided, for consideration in the evaluation process or contract negotiations, incorrect information which the Proposer knew or should have known was materially incorrect, that proposal will be determined non-responsive, and the proposal may be rejected.

7.8 Prohibition of Proposer Terms and Conditions

A Proposer may not submit the Proposer's own contract terms and conditions in a response to this RFP. If a proposal contains such terms and conditions, the City, at its sole discretion, may determine the proposal to be a nonresponsive counteroffer, and the proposal may be rejected.

7.9 Assignment and Subcontracting

The Contractor may not subcontract, transfer, or assign any portion of the contract without prior written approval from the City. Each subcontractor must be approved in writing by the City. The substitution of one subcontractor for another may be made only at the discretion of the City and with prior, written approval from the City.

Notwithstanding the use of approved subcontractors, the Proposer, if awarded a contract under this RFP, will be the prime contractor, will be responsible for all work performed, and will be responsible for all costs to subcontractors for services provided by the Proposer. The Proposer is prohibited from performing any work associated with this RFP or using contractors for any service associated with this RFP offshore (outside the United States).

7.10 Right to Refuse Personnel

The City reserves the right to refuse, at its sole discretion, any subcontractors or any personnel provided by the prime contractor or its subcontractors. The City reserves the right to interview and approve all Proposers' staff. Proposer's staff may be subject to the City's background and drug testing processes at any time.



7.11 Proposal of Additional Services

If a Proposer indicates an offer of services in addition to those required by and described in this RFP, these additional services may be added to the contract before contract signing at the sole discretion of the City.

7.12 Licensure

Before a contract pursuant to this RFP is signed, the Proposer must hold all necessary, applicable business and professional licenses. The City may require any or all Proposers to submit evidence of proper licensure.

7.13 Conflict of Interest and Proposal Restrictions

By submitting a response to the RFP, the Proposer certifies that no amount will be paid directly or indirectly to an employee or official of the City as wages, compensation, or gifts in exchange for acting as an officer, agent, employee, subcontractor, or consultant to the Proposer in connection with the procurement under this RFP.

Notwithstanding this restriction, nothing in this RFP will be construed to prohibit another governmental entity from making a proposal, being considered for award, or being awarded a contract under this RFP.

Any individual, company, or other entity involved in assisting the City in the development, formulation, or drafting of this RFP or its scope of services will be considered to have been given information that would afford an unfair advantage over other Proposers, and said individual, company, or other entity may not submit a proposal in response to this RFP.

7.14 Contract Negotiations

After a review of the proposals and completion of the POC session and additional due diligence, the City intends to enter into contract negotiations with the selected Proposer. These negotiations could include all aspects of services and fees. If a contract is not finalized in a reasonable period of time, the City will open negotiations with the next ranked service provider.

7.15 Execution of Contract

If the selected Proposer does not execute a contract with the City within thirty (30) business days after notification of selection, the City may give notice to that service provider of the City's intent to select from the remaining Proposers or to call for new proposals, whichever the City deems appropriate.

7.16 Right of Rejection

The City reserves the right, at its sole discretion, to reject any and all proposals or to cancel this RFP in its entirety.



Any proposal received which does not meet the requirements of this RFP may be considered to be nonresponsive, and the proposal may be rejected. Proposers must comply with all of the terms of this RFP and all applicable State laws and regulations. The City may reject any proposal that does not comply with all of the terms, conditions, and performance requirements of this RFP.

Proposer may not restrict the rights of the City or otherwise qualify their proposal. If a Proposer does so, the City may determine the proposal to be a nonresponsive counteroffer, and the proposal may be rejected.

The City reserves the right, at its sole discretion, to waive variances in technical proposals provided such action is in the best interest of the City. Where the City waives minor variances in proposals, such waiver does not modify the RFP requirements or excuse the Proposer from full compliance with the RFP. Notwithstanding any minor variance, the City may hold any Proposer to strict compliance with the RFP.

7.17 Disclosure of Proposal Contents

All proposals and other materials submitted in response to this RFP procurement process become the property of the City. Selection or rejection of a proposal does not affect this right. All proposal information, including detailed price and cost information, will be held in confidence during the evaluation process. Upon the completion of the evaluation of proposals, the proposals and associated materials will be open for review by the public to the extent allowed by the California Public Records Act, (Government Code Section 6250-6270 and 6275-6276.48). By submitting a proposal, the Proposer acknowledges and accepts that the contents of the proposal and associated documents will become open to public inspection.

7.18 Proprietary Information

The master copy of each proposal will be retained for official files and will become public record after the award of a contract unless the proposal or specific parts of the proposal can be shown to be exempt by law (Government code §6276). Each Proposer may clearly label part of a proposal as "CONFIDENTIAL" if the Proposer thereby agrees to indemnify and defend the City for honoring such a designation. The failure to so label any information that is released by the City will constitute a complete waiver of all claims for damages caused by any release of the information. If a public records request for labeled information is received by the City, the City will notify the Proposer of the request and delay access to the material until seven working days after notification to the Proposer. Within that time delay, it will be the duty of the Proposer to act in protection of its labeled information. Failure to so act will constitute a complete waiver.

7.19 Severability

If any provision of this RFP is declared by a court to be illegal or in conflict with any law, the validity of the remaining terms and provisions will not be affected; and, the rights and obligations of the City and Proposer will be construed and enforced as if the RFP did not contain the particular provision held to be invalid.



7.20 RFP and Proposal Incorporated into Final Contract

This RFP and the successful proposal will be incorporated into the final contract.

7.21 Proposal Amendment

The City will not accept any amendments, revisions, or alterations to proposals after the deadline for proposal submittal unless such is formally requested, in writing, by the City.

7.22 Consultant Participation

The City reserves the right to share with any consultant of its choosing this RFP and proposal responses in order to secure a second opinion. The City may also invite said consultant to participate in the Proposal Evaluation process.

7.23 Warranty

The selected software proposer will warrant that the proposed software will conform in all material respects to the requirements and specifications as stated in this RFP, demonstrated in both the software demonstration and subsequent proof-of-capabilities. Further, those requirements as stated in this RFP will become part of the selected software Proposer's license and the software Proposer will warrant to the requirements. The selected Proposer must warrant that the content of its proposal accurately reflects the software's capability to satisfy the functional/technological requirements as included in this RFP. Furthermore, the warranty, at a minimum, should be valid for the duration of the implementation and until final acceptance (as will be defined during the negotiation process) of all application modules included in the implementation.

7.24 Rights of the City

The City reserves the right to:

- ◆ Make the selection based on its sole discretion
- ◆ Reject any and all proposals
- ◆ Issue subsequent Requests for Proposals
- ◆ Postpone opening proposals, if necessary, for any reason
- ◆ Remedy errors in the Request for Proposal process
- ◆ Approve or disapprove the use of particular subcontractors
- ◆ Negotiate with any, all, or none of the Proposers
- ◆ Accept other than the lowest offer
- ◆ Waive informalities and irregularities in the proposals
- ◆ Enter into an agreement with another Proposer in the event the originally selected Proposer defaults or fails to execute an agreement with the City



An agreement will not be binding or valid with the City unless and until it is approved by the City Council and executed by authorized representatives of the City and of the Proposer.

7.25 Project Funding

The City of Chino Hills has been awarded a grant under the Senate Bill 2 Planning Grants Program. The procurement of the LMS shall be in part funded by this grant. As such the Proposer shall acknowledge and agree to terms noted in Appendix D of this RFP. Additionally, these terms will be incorporated into the final contract.



Appendix A – City Professional Services Agreement / Insurance Requirements

It is recognized that the formal basis of any agreement between the City and the service provider is a contract rather than a proposal. In submitting proposals, Proposers must indicate that they are prepared to complete the City's Agreement for Professional Services, which is provided as an attachment to this RFP.

In addition, the selected Proposer will be expected to accommodate the City Insurance Requirements detailed within the City Professional Services Agreement.

The selected Proposer will be expected to accept these terms and conditions unless they otherwise take exception in their cover letter.



Appendix B – Response Requirements Template

The Proposer is expected to complete the response requirements template provided in electronic Word format as an Attachment to this RFP.



Appendix C – Mandatory Pricing Sheets

The Proposer is expected to complete the mandatory price sheets provided in electronic Excel format as an attachment to this RFP.



Appendix D – SB2 Planning Grants Program

Details related to the State of California's Planning Grants Program are included as an attachment to this RFP.

