COLUMBUS CONSOLIDATED GOVERNMENT
Georgia's First Consolidated Government

FINANCE DEPARTMENT
PURCHASING DIVISION

Date: **December 12, 2018**

REQUEST FOR PROPOSALS: **RFP No. 19-0009**	Qualified vendors are invited to submit sealed proposals, subject to conditions and instructions as specified, for the furnishing of: **Constituent Relationship Management (311) System**
GENERAL SCOPE	Columbus Consolidated Government (the City) invites qualified vendors to submit proposals to provide and support a Constituent Relationship Management (CRM) System. **Option 1:** The City also requires an Asset Management System (AMS). The proposed AMS shall be a component of the CRM or shall be compatible with standard AMS software. Preference will be given to vendors capable of providing both a CRM and AMS that are compatible.
DUE DATE	**JANUARY 11, 2019 - 5:00 PM (EASTERN)** Sealed proposals must be received and date/time stamped on or before the due date by the Finance Department/Purchasing Division of Columbus Consolidated Government, located on the 5th Floor, Government Center Tower, 100 Tenth Street, Columbus, GA.
ADDENDA	**IMPORTANT INFORMATION** The Purchasing Division will post addenda (if any) for this project at https://www.columbusga.gov/finance/purchasing/docs/opportunities/Bid_Opportunities.htm. **It is the vendors' responsibility to periodically visit the web page for addenda, before the due date and prior to submitting a proposal.**
NO PROPOSAL SUBMISSION	If you are not interested in this solicitation, please complete and return page 3.

Andrea J. McCorvey,
Purchasing Division Manager

IMPORTANT INFORMATION
E-Notification

Effective December 31, 2014, Columbus Consolidated Government (the City) discontinued mailing postcard notifications to its registered vendors, and began using the Georgia Procurement Registry e-notification system.

You must register with the Team Georgia Marketplace to receive future procurement notifications at http://doas.ga.gov/state-purchasing/suppliers/getting-started-as-a-supplier.

If you have any questions or encounter any problems while registering, please contact the Team Georgia Marketplace Procurement Helpdesk:

Telephone: 404-657-6000

Fax: 404-657-8444

Email: procurementhelp@doas.ga.gov

STATEMENT OF "NO PROPOSAL SUBMISSION"

Notify the Purchasing Division if you do not intend to submit a Proposal:

Email BidOpportunities@ColumbusGA.org or return this form, via fax or mail, to:
Fax number 706-225-3033
Attn: Della Lewis, CPPB, Buyer Specialist
Columbus Consolidated Government
Purchasing Division
P. O. Box 1340
Columbus, Georgia 31902-1340

We, the undersigned decline to submit a proposal for **RFP No. 19-0009** for **Constituent Relationship Management (311) System,** for the following reason(s):

___Specifications are too "tight", i.e. geared towards one brand or manufacturer (explain below)
___There is insufficient time to respond.
___We do not offer this product and/or service.
___We are unable to meet specifications.
___We are unable to meet bond requirements.
___Specifications are unclear (explain below).
___We are unable to meet insurance requirements.
___Remove us from your vendor list for this commodity or service.
___Other (specify below)

Comments

_____

_____

_____

We understand that if this statement is not completed and returned, Columbus Consolidated Government may delete our company from its bidder list for this commodity or service.

COMPANY NAME:_____

AGENT:_____

DATE:_____

TELEPHONE NUMBER:_____

ADDRESS:_____

_____

PROPOSALS WILL BE EVALUATED IN ACCORDANCE WITH THE PROCEDURES AS OUTLINED BELOW IN SECTIONS 3-110 OF THE PROCUREMENT ORDINANCE. ALL PROPOSALS WILL BE KEPT CONFIDENTIAL.

3-110 <u>**Competitive Sealed Proposals (Competitive Sealed Negotiations) For Equipment, Supplies or Professional Services - $10,000 and Above**</u>

(1) <u>**Conditions for Use**</u>
When the Purchasing Division Manager determines that the use of competitive sealed bidding for any procurement is either not practicable or not advantageous to the City, a contract may be entered into using the competitive sealed proposals (negotiation) method. In addition, the competitive sealed proposal process shall be used for the procurement of professional services.

The competitive sealed proposal process may be used for procurements with an estimated total cost less than $10,000, if deemed to be in the best interest of the City. If the total cost can be determined, the authority to approve such solicitations will be as prescribed by Article 3-104, <u>Purchasing Limits.</u> If, due to the required services, a total cost cannot be determined then the award recommendation will be approved by Council.

A. <u>**Request for Proposals**</u>
Proposals shall be solicited through Request for Proposals. The Purchasing Division shall establish the specifications with the using agency and set the date and time to receive proposals. The request for proposal shall include a clear and accurate description of the technical requirements for the service or item to be procured.

B. <u>**Public Notice**</u>
Adequate public notice of the Request for Proposals shall be given in the same manner as provided under the section titled "Competitive Sealed Bids."

C. <u>**Receipt of Proposals**</u>
Proposals must be received by the deadline date established. No public opening will be held. No proposals shall be handled so as to permit disclosure of the identity of any offeror or the contents of any proposal to competing offerors during the process of discussion. A register of proposals shall be prepared as part of the contract file, and shall contain the name of each offeror, the number of modifications received (if any), and a description sufficient to identify the item offered. The register of proposals shall be open for public inspection only after contract award.

D. <u>**Evaluation Factors.**</u>
The Request for Proposals shall identify all significant evaluation factors (including price or cost) and their relative importance. Mechanisms shall be established for technical evaluation of the proposals received, determinations of responsible offerors for the purpose of written or oral discussions, and selection for contract award.

E. <u>**Discussion with Responsible Offerors and Revisions to Proposals**</u>
As provided in the Request for Proposals, discussions (negotiations) may be conducted with responsible offerors who submit proposals determined to be reasonably susceptible of being selected for award, to assure full understanding of

and conformance to the solicitation requirements. All qualified, responsible offerors shall be given fair and equal treatment with respect to any opportunity for discussion and revision of proposals, and such revisions may be permitted after submissions and prior to award for the purpose of obtaining best and final offers. In conducting discussions, there shall be no disclosure of the identity of competing offerors or any information derived from proposals submitted by competing offerors. If only one proposal response is received, then the award recommendation shall be to the single offeror, if the offeror meets all requirements.

F.   **<u>Award.</u>**
After negotiations, the award recommendation must be presented to Columbus City Council for final approval. Award will be made to the responsible offeror whose proposal is determined to be the most advantageous to the City, taking into consideration total cost (if determined) and all other evaluation factors set forth in the Request for Proposals.

After Council approval, a contract based on the negotiations (if negotiations were necessary) will be drawn and signed by all necessary parties. If Council does not approve the award, further negotiations may take place with the recommended offeror or negotiations will begin with the next most qualified offerer. The contract file shall contain the basis on which the award is made.

After contract award, the contract file will be made public. Offerors will be afforded the opportunity to make an appointment to review the contract file.

DO YOU HAVE QUESTIONS, CONCERNS OR NEED CLARIFICATION ABOUT THIS SOLICITATION?

COMMUNICATION CONCERNING ANY SOLICITATION CURRENTLY ADVERTISED MUST TAKE PLACE IN WRITTEN FORM AND ADDRESSED TO THE PURCHASING DIVISION.

ALL QUESTIONS OR CLARIFICATIONS CONCERNING THIS SOLICITATION SHALL BE SUBMITTED IN WRITING. THE CITY WILL NOT ORALLY OR TELEPHONICALLY ADDRESS ANY QUESTION OR CLARIFICATION REGARDING BID/PROPOSAL SPECIFICATIONS. IF A VENDOR VISITS OR CALLS THE PURCHASING DIVISION WITH SUCH QUESTIONS, HE OR SHE WILL BE INSTRUCTED TO SUBMIT THE QUESTIONS IN WRITING.

ALL CONTACT CONCERNING THIS SOLICITATION SHALL BE MADE THROUGH THE PURCHASING DIVISION. BIDDERS SHALL NOT CONTACT CITY EMPLOYEES, DEPARTMENT HEADS, USING AGENCIES, EVALUATION COMMITTEE MEMBERS OR ELECTED OFFICIALS WITH QUESTIONS OR ANY OTHER CONCERNS ABOUT THE SOLICITATION. QUESTIONS, CLARIFICATIONS, OR CONCERNS SHALL BE SUBMITTED TO THE PURCHASING DIVISION IN WRITING. IF IT IS NECESSARY THAT A TECHNICAL QUESTION NEEDS ADDRESSING, THE PURCHASING DIVISION WILL FORWARD SUCH TO THE USING AGENCY, WHO WILL SUBMIT A WRITTEN RESPONSE.

THE PURCHASING DIVISION WILL FORWARD WRITTEN RESPONSES TO THE RESPECTIVE BIDDER OR IF IT BECOMES NECESSARY TO REVISE ANY PART OF THIS SOLICITATION, A WRITTEN ADDENDUM WILL BE ISSUED TO ALL BIDDERS.

THE CITY IS NOT BOUND BY ANY ORAL REPRESENTATIONS, CLARIFICATIONS, OR CHANGES MADE TO THE WRITTEN SPECIFICATIONS BY CITY EMPLOYEES, UNLESS SUCH CLARIFICATION OR CHANGE IS PROVIDED TO THE BIDDERS IN A WRITTEN ADDENDUM FROM THE PURCHASING MANAGER.

BIDDERS ARE INSTRUCTED TO USE THE ENCLOSED "QUESTION/CLARIFICATION FORM" TO FAX OR EMAIL QUESTION.

ANY REQUEST, AFTER A SOLICITATION HAS CLOSED AND PENDING AWARD MUST ALSO BE SUBMITTED IN WRITING TO THE PURCHASING DIVISION.

QUESTION/CLARIFICATION FORM

Date: _____

To: Della Lewis, Buyer Specialist
Email BidOpportunities@ColumbusGA.org or
Fax (706) 225-3033

Re: **Constituent Relationship Management (311) System; RFP No. 19-0009**

Questions and requests for clarification must be submitted at least five (5) business days before the due date:

_____

_____

_____

_____

_____

_____

_____

From:

Company Name	Website
Representative	Email Address
Complete Address	City State Zip
Telephone Number	Fax Number

COLUMBUS CONSOLIDATED GOVERNMENT
GENERAL PROVISIONS FOR REQUEST FOR PROPOSALS

Constituent Relationship Management (311) System
RFP No. 19-0009

Columbus Consolidated Government (the City) invites qualified vendors to submit proposals to provide and support a Constituent Relationship Management (CRM) System.

Option 1: The City also requires an Asset Management System (AMS). The proposed AMS shall be a component of the CRM or shall be compatible with standard AMS software. Preference will be given to vendors capable of providing both a CRM and AMS that are compatible.

A. PROPOSAL SUBMITTAL DATE:
SEALED PROPOSALS ARE DUE: JANUARY 11, 2019 NO LATER THAN 5:00 PM (Eastern). *Submit one (1) original and ten (10) identical copies of the proposal.* For proper identification, the proponent's complete name and address should appear on the exterior of the proposal package.

The proposal should be hand delivered or mailed to the following:

> Columbus Consolidated Government - Purchasing Division
> **RE: CRM/311 System – RFP No. 19-0009**

> Mail: P.O. Box 1340
> Columbus, Georgia 31902-1340

> Deliver: 100 10th Street
> Columbus, Georgia 31901

If the proposal does not reach the Purchasing Division on or before the due date, the proposal will be returned to the Proposer unopened. It is the Proponent's responsibility to insure the proposal is mailed or delivered by the due date. The City will not be held responsible for proposals delayed by the US Mail or any other courier.

The City shall not be held liable for any expenses incurred by the respondent in preparing and submitting the proposal and/or attendance at any interviews, final contract negotiations or applicable site visits. The City reserves the right to award this project or to reject any and all proposals; whichever is in the best interest of the City.

B. RECEIPT OF PROPOSALS:
Unless otherwise stated in the technical specifications of the RFP, the City will accept one, and only one, proposal per Offeror. In the event a team of firms is entering into a joint venture to respond to the RFP, one firm shall be named the prime contractor and the proposal shall be submitted in the name of the prime contractor. All correspondence concerning the RFP will be between the City and prime contractor.

C. SUBCONTRACTING:

Should the offeror intend to subcontract all or any part of the work specified, names and address of subcontractors must be provided in proposal response. The offeror shall be responsible for subcontractors' full compliance with the requirements of the RFP specifications. If awarded the contract, payments will only be made to the offerors submitting the proposal. The Columbus Consolidated Government will not be responsible for payments to subcontractors.

D. QUESTIONS ABOUT THE RFP:

Communication concerning any solicitation currently advertised must take place in writing and addressed to the Purchasing Division. See page titled "Do You Have Questions …" within this proposal package. **Questions and Requests for Clarification will be received until five business days prior to the proposal due date.**

E. PUBLIC INFORMATION:

All information and materials submitted will become the property of the Columbus Consolidated Government, Columbus, Georgia; and shall be subject to the provisions of the Georgia public records law. If awarded the contract, the proposal submission, in its entirety, will be included as part of the contract documents and filed, as public record, with the Clerk of Council.

F. ADDENDA:

The proposer shall include acknowledgment of receipt of addenda (if any) in their sealed proposal. The proposer should include an initialed copy of each addendum in the proposal package. It is the proposer's responsibility to contact the City for copies of addenda if they receive the proposal document from any other source other than the City.

G. CONTRACT:

Each proposal is received with the understanding that an acceptance in writing by the City of the offer to furnish any or all of the services and materials described shall constitute a contract between the proposer and the City. This contract shall bind the proposers to furnish and deliver the services and materials quoted, at the prices stated and in accordance with the condition of said accepted proposal.

It is agreed that the successful respondent will not assign, transfer, convey or otherwise dispose of the contract or its right, title or interest in or to the same, or any part thereof, without previous consent of the City and any sureties.

H. NON-COLLUSION:

Proposer declares that the proposal is not made in connection with any other proposer submitting a proposal for the same commodity or commodities, and that the proposal is bona fide and is in all respects fair and without collusion or fraud.

I. INDEMNITY:

The successful respondent agrees, by entering into this contract, to defend, indemnify and hold City harmless from any and all causes of action or claims of damages arising out of or under this contract.

J. DISADVANTAGED BUSINESS ENTERPRISE CLAUSE:

Disadvantaged Business Enterprises (minority or women owned businesses) will be afforded full opportunity to submit proposals in response to this invitation and will not be discriminated against on the grounds of race, color, creed, sex, sexual orientation, gender identity or national origin in

consideration for an award. It is the policy of the City that disadvantaged business enterprises and minority business enterprises have an opportunity to participate at all levels of contracting in the performance of City contracts to the extent practical and consistent with the efficient performance of the contract.

K.   AFFIRMATIVE ACTION PROGRAM - NON-DISCRIMINATION CLAUSE:
The City has an Affirmative Action Program in connection with Equal Employment Opportunities. The successful vendor will comply with all Federal and State requirements concerning fair employment and employment of the handicapped, and concerning the treatment of all employees, and will not discriminate between or among them by reason of race, color, age, religion, sex, sexual orientation, gender identity, national origin or physical handicap.

L.   SPECIFICATION DESCRIPTIONS:
The specifications detailed herein represent the quality of equipment, goods or services required by the City. Whenever in this invitation any particular process, service or equipment is indicated or specified by patent, proprietary or brand name of manufacturer/developer/inventor, such wording will be deemed to be used for the purpose of facilitating descriptions of the process, service or equipment desired by the City. It is not meant to eliminate offerors or restrict competition in any RFP process. Proposals that are equivalent or surpass stated specifications will be considered. Determination of equivalency shall rest solely with the City.

M.   TAXES:
The City is exempt from State Retail Tax and Federal Excise Tax. Tax Exemption No. GA Code Sec. 48-8-3. Federal ID No. 58-1097948.

N.   DRUG-FREE WORKPLACE:
Per Ordinance No. 93-55, in compliance with Federal and State Drug Free Workplace Acts, the Council of Columbus, Georgia adopted a drug free Workplace Policy. Consequently, any vendor providing goods or services to Columbus Consolidated Government must comply with all applicable Federal and State Drug Free Workplace Acts.

O.   FEDERAL, STATE, LOCAL LAWS:
All respondents will comply with all Federal, State and Local laws, ordinances, rules and regulations relative to conducting business in Columbus, Georgia and performing the prescribed service. Ignorance on the part of the respondent shall not, in any way, relieve the respondent from responsibility for compliance with said laws and regulations or any of the provisions of these documents.

P.   PROVISIONS OF THE PROCUREMENT ORDINANCE:
The provisions of the Procurement Ordinance for the Consolidated Government of Columbus, Georgia as adopted and amended by Council shall apply to all invitations to respond to Requests for Proposals and is specifically incorporated herein by this reference. A copy of the ordinance is on file in the Purchasing Division.

Q.   INSURANCE:
All respondents shall maintain, and if requested, show proof of insurance applicable for services described in these specifications.

R.   HOLD HARMLESS AGREEMENT:
The successful respondent hereby agrees to indemnify, hold free and harmless Columbus Consolidated Government (The City), its agents, servants, employees, officers, directors and elected officials or any other person(s) against any loss or expense including attorney fees, by reason of any liability imposed by law upon the City, except in cases of the City's sole negligence, sustained by any person(s) on account of bodily injury or property damage arising out of or in the consequence of this agreement.

S.   TERMINATION OF CONTRACT:
1. **Default**: If the contractor refuses or fails to perform any of the provisions of this contract with such diligence as will ensure its completion within the time specified in this contract, or any extension thereof, otherwise fails to timely satisfy the contract provisions, or commits any other substantial breach of this contract, the Purchasing Division Director may notify the contractor in writing of the delay or nonperformance and if not cured within **ten (10) days** or any longer time specified in writing by the Purchasing Division Director, such director may terminate the contractor's right to proceed with the contract or such part of the contract as to which there has been delay or a failure to properly perform.

   In the event of termination in whole or in part the Purchasing Division Director may procure similar supplies or services, from other sources, in a manner and upon terms deemed appropriate by the Purchasing Division Director. The contractor will continue performance of the contract to the extent it is not terminated and will be liable for excess costs incurred in procuring similar goods or services.

2. **Compensation:** Payment for completed supplies or services delivered and accepted by the City will be at the contract price. The City may withhold from amounts due the contractor such sums as the Purchasing Director deems to be necessary to protect the City against loss because of outstanding liens or claims of former lien holders and to reimburse the City for the excess costs incurred in procuring similar goods and services.

3. **Excuse for Nonperformance or Delayed Performance**. Except with respect to defaults of subcontractors, the contractor shall not be in default by reason of any failure in performance of this contract in accordance with its terms (including any failure by the contractor to make progress in the prosecution of the work hereunder which endangers such performance) if the contractor has notified the Purchasing Division Director within 15 days after the cause of the delay and the failure arises out of causes such as: acts of God; acts of public enemy; acts of the City and any other governmental entity in its sovereign or contractual capacity; fires; floods; epidemics; quarantine restrictions; strikes or other labor disputes; freight embargoes; or unusually severe weather, If the failure to perform is caused by the failure of a subcontractor to perform or to make progress, and if such failure arises out of causes similar to those set forth above, the contractor shall not be deemed to be in default, unless the supplies or services to be furnished by the subcontractor was reasonably obtainable from other sources in sufficient time to permit the contractor to meet the contract requirements.

   Upon request of the contractor, the Purchasing Division Director shall ascertain the facts and extent of such failure, and, if such director determines that any failure to perform was occasioned by anyone or more of the excusable causes, and that, but for

the excusable cause, the contractor's progress and performance would have met the terms of the contract, the delivery schedule shall be revised accordingly.

T.   TIME FOR CONSIDERATION:
Due to the evaluation process, proposals must remain in effect for at least **120 days** after date of receipt.

U.   CONTRACT AWARD:
Award of this contract will be made in the best interest of the City.

V.   REQUEST FOR EVALUATION RESULTS:
Per the City's Procurement Ordinance, evaluation results cannot be divulged until after the award of the contract. After contract award, proponents desiring to review documents relevant to the RFP evaluation results will be afforded an opportunity by appointment only.

W.   GOVERNING LAW:
The parties agree that this Agreement shall be governed by the laws of Georgia, both as to interpretations and performance.

X.   FINAL CONTRACT DOCUMENTS:
It is understood that the final contract shall include the following: 1) The RFP; 2) Addenda; 3) Awarded Vendors(s) response; 4) Awarded Vendor(s) Clarifications; 5) Negotiated Components; 6) Additional Agreements required by Awarded Vendor(s); and 7) Awarded Vendor(s) Business Requirements.

Y.   PAYMENT DEDUCTIONS:
The City reserves the right to deduct from payments to awarded vendor(s), any amount owed to the City for various fees, to include, but not limited to: False Alarm fees, Ambulance fees, Occupation License Fees, Landfill fees, etc.

Z.   PAYMENT TERMS:
The City's standard payment term is usually net 30 days, after successful receipt of goods or services. Payment may take longer if invoice is not properly documented or not easily identifiable, goods/services are not acceptable, or invoice is in dispute.

NOTICE TO VENDORS

Columbus Council, by Ordinance 92-60 has prohibited any business, which is owned by any member of Columbus Council or the Mayor, or any business in which any member of Columbus Council or the Mayor has a substantial pecuniary interest from submitting a bid for goods or services to the Consolidated Government of Columbus, Georgia.

Likewise, by Ordinance 92-61, no business which is owned by any member of any board, authority or commission, subordinate or independent entity, or any business in which any member of any board, authority or commission, subordinate or independent entity has substantial pecuniary interest may submit a bid to the Consolidated Government if such bid pertains to the board, authority or commission.

SPECIFICATIONS
CONSTITUENT RELATIONSHIP MANAGEMENT (311) SYSTEM
RFP NO. 19-0009

I.   **SCOPE**

    A. Columbus Consolidated Government (the City) is pleased to invite the submission of proposals for the modernization of the City's Constituent Relationship Management ("CRM") system and processes to not only replace the City's current technology, but to provide a holistic, transformative solution to help the City of Columbus provide world-class resident relationship management services. The City sees the new CRM solution as the platform for this vision. However, this is strictly a tool. The Selected Respondent must deliver a comprehensive solution that empowers the City to provide convenient, user-friendly access for residents to connect, communicate, and collaborate with the City and with each other.

    B. **Option 1:** Included in this upgrade of technology the City requires a company that has an Assets Management Component or be compatible to standard Assets Management Software. Preference will be given to those vendors whose capabilities provide both a CRM System and an Assets Management System that are compatible.

    C. **Columbus Consolidated Government anticipates procuring both systems in its Fiscal Year 2019 (beginning on July 1, 2019); therefore, responding firms are requested to hold their pricing until August 30, 2019.**

    D. **Refer to Appendix A and Appendix B for Technical Specifications.**

II.   **INDEMNITY CLAUSE**

The Contractor covenants to save, defend, hold harmless, and indemnify the City, and all of its officers, departments, agencies, agents, and employees (collectively the "City") from and against any and all claims, losses, damages, injuries, fines, penalties, costs (including court costs and attorney's fees), charges, liability, or exposure, however caused, resulting from, arising out of, or in any way connected with the Contractor's intentional, negligent, or grossly negligent acts or omissions in performance or nonperformance of its work called for by the Contract Documents.

III.   **INSURANCE**

The vendors shall be required, at their own expense, to furnish to the City of Columbus Purchasing Division**,** evidence showing the insurance coverage to be in force throughout the term of the contract. Insurance requirements are listed on the attached **Insurance Checklist (Form 2). The limits shown are minimum limits. Vendor shall indicate the actual limit they will provide for each insurance requirement. The bidder shall complete the Insurance Checklist and include with bid response**. **Certificate of Insurance is acceptable.** The Insurance Checklist will indicate to the City, the bidder's ability and agreement to provide the required insurance, in the event of contract award.

The successful candidate shall provide the required Certificates of Insurance within **10 business days** after award notification. The Certificates of Insurance will be included with the contract documents prior to signing.

IV.   GEORGIA SECURITY AND IMMIGRATION COMPLIANCE ACT

In accordance with the Georgia Security and Immigration Compliance Act/E-Verify, every public employer, every contractor of a public employer, and every subcontractor of a public employer's contractor must register and participate in a federal work authorization program (see http://www.dol.state.ga.us/spotlight/sp_sb_529_new_rules.htm). **A completed, notarized E-Verify Affidavit must be included with sealed proposal; failure to do so will render the firm's or individual's proposal non-responsive and ineligible for award consideration.**

V.   PROPOSAL SUBMISSION REQUIREMENTS

The complete proposal shall contain the following information and shall be submitted in the order shown below. *Please address each section in your proposal submission and divide each section, of your proposal, with identifying tabs.*

> **Firms should submit proposals that address each of the sections specified below.** *With the exception of the E-Verify affidavit***, the City reserves the right to request any omitted information. Firms shall be notified, in writing, and shall have two (2) days, after notification, to submit the omitted information. If the omitted information is not received within two (2) days, the firm shall be deemed non-responsive and the proposal will not receive further consideration.**

PART A. TECHNICAL PROPOSAL

Section 1:   Transmittal Letter

    A. Transmittal letter shall introduce the company, describe the ownership, include complete address, phone and fax numbers, and include the name and email of contact person(s) during this proposal process. The cover letter must contain a statement to the effect that the proposal is binding for at least 120 days from the proposal date.

    B. Indicate if you will hold the proposed pricing until August 30, 2019. **An authorized agent of the business must sign the transmittal letter.**

Section 2:   Affidavit for E-Verify/Georgia Security and Immigration Compliance Act (Form 1)
A properly completed, notarized E-Verify Affidavit must be included with sealed proposal**; failure to do so will render the firm's proposal non-responsive and ineligible for further consideration.** To access your E-Verify Company Identification Number, see https://e-verify.uscis.gov/emp/vislogin.aspx?JS=YES.

Section 3:   Addenda Acknowledgement
Acknowledge receipt for all addenda (if any). Addenda will be posted at: https://www.columbusga.gov/finance/purchasing/docs/opportunities/Bid_Opportunities.htm. It is the vendors' responsibility to periodically visit the web page for addenda, before the due date and before submitting a proposal.

Section 4:   Qualifications/Experience

    A. Address in detail the Offeror's ability and experience in providing the systems and services described in the specifications. Preference will be given to vendors capable of providing both a CRM and AMS that are compatible.

    B. Provide résumés of key personnel who will be assigned to the contract.

Section 5:   Client Work History
Use **Form 4** to list the last five (5) entities for which similar systems and services have been provided within the last five (5) years. Include the entity name and address; contact name, email and telephone number; a brief description of the system/services provided.

Section 6:   **Proposed Systems**
     A. Provide descriptive literature that fully describe how the proposed CRM System and Asset Management System meets the specified technical requirements.
     B. Complete the CRM Software Requirements form, referred to as **Attachment A** on page 19, Section 3.1.

Section 7:   **Service Plan**
     A. Provide an itemized service plan for accomplishing the services described in Appendix A and Appendix B.
     B. Include a project schedule; do *not* include actual dates in the timeline, rather days, weeks and months.

Section 8:   **Cost Proposals**
     A. <u>Constituent Relationship Management System</u>:
     Provide a detailed cost proposal itemizing all associated costs, including, but not limited to, the following *(if applicable)* for:
     1. Application Development
     2. Integration and Interfacing
     3. Technical Support and Resolution
     4. Service and Maintenance
     5. Secure Data Collection and Storage
     6. Management and Implementation of the future application upgrades
     7. Future Expansion to Application Functionality

     B. <u>Option 1 - Asset Management System</u>:
     Provide a detailed cost proposal itemizing all associated costs, including, but not limited to, the following for:
     1. Hosted Deployment
     2. Citizen Request portal for smartphones and the web
     3. Four (4) user licenses
     4. Work Management
     5. Resources Management
     6. 20 asset modules (Pavement, Signs, Trees, Sewer Lift Stations, Sewer Lateral, Sewer Main, Sewer Manhole, Storm Basin, Storm Manhole, Storm Pipe, Water Hydrant, Water Lateral, Water Main, Water Valve, Facility, Facility Lighting, Roofing, HVAC, Playgrounds, and Sidewalks).

Section 9:   **Contract Signature Page**
Complete **Form 5**. City officials will sign the copies after Columbus Council approves the contract award with the successful firm. Contracts for Columbus Consolidated Government are typically comprised of the RFP specifications and addenda; the business documents of the successful firm; the proposal of the successful firms; cost proposal/negotiation documents; and any clarification documents. Per Section 9 below, the firm's agreement/contract form may be incorporated into the contract; subject to review and approval by the City's Legal Department.

Section 10:   **Agreement/Contract Form** *(If Applicable)*
Provide a copy of any and all Agreement(s)/Contract Form(s) the City would be required to sign prior to entering into a contract with your firm. The agreement provided shall not contradict the RFP specifications and/or any addenda. *Exceptions to the RFP specifications must be submitted, in writing as a clarification/question, prior to the due date of the RFP. **Exceptions to specifications will not be accepted after the proposal due date.**

PART B. BUSINESS REQUIREMENTS

IN A SEPARATE ENVELOPE, SUBMIT *ONE (1) COPY* OF THE FOLLOWING DOCUMENTS:

1. Provide Insurance Checklist **(Form 2)** or Certificate of Insurance

2. W-9 (**Form 3**)

3. Provide a current <u>copy</u> of the Business License (Occupation License) that is required to conduct business at your location.

    If awarded the contract, the successful vendor must obtain a business license from the City of Columbus. However, if the business is located in Georgia and has proof of being properly licensed by a municipality in Georgia, and paid applicable occupation taxes in that city, the contractor will not be required to pay occupation taxes in Columbus, Georgia.

    If you have questions regarding this requirement, please contact Yvonne Ivey, Revenue Division Manager, at telephone 706-225-3091.

VI.   RFP EVALUATION

Each submittal will be evaluated to determine the ability of each proposer to provide the required services. The following weighted criteria will be used to evaluate proposals:

Criteria	Weight
A. Qualifications & Experience	30%
B. Proposed System	30%
C. Service Plan	20%
D. Client Work History	15%
E. Proposed Cost *(subject to negotiations)*	5%
Total	100%

Each of the above criteria (A – E) will be given a rating, of 1 through 100, by each member of the Evaluation Committee. The ratings are as follows:

RATING	DESCRIPTION
1-20	Poor
21-40	Fair
41-60	Good
61-80	Excellent
81-100	Superior

After the review and rating of proposal(s) by the evaluation committee, individual scores will be averaged and ranked. Offerors will be ranked in descending order of numerical predominance.

APPENDIX B

TECHNICAL SPECIFICATIONS & FUNCTIONAL REQUIREMENTS
Constituent Relationship Management System

1.   PROJECT REQUIREMENTS

The selected Respondent must be able to demonstrate substantial experience with similar projects described in this RFP, have the human resources and financial capacities to execute the project successfully, and have the availability of the full range of skills and expertise necessary to carry out the Project as dictated by the City's schedule. Specific discussion of past engagements incorporating similar requirements is preferred over generalized representations of the Respondent's experience. Included below is a detailed description of the business needs related to this RFP.

Your response should include a detailed, comprehensive itemized pricing plan for the first year as well as subsequent years, an overview of your company and its capability to complete the Project, the bios of the personnel to be assigned to the Project, and a complete Statement of Work, including your proposed methodology for your evaluation/detailed Project Plan. The City anticipates that this process should be completed in FY19. Please provide a Proposed Project Schedule, including your recommended time-frame for the Project in your Project Plan. The solution should be a cloud-based solution with no on-premise hardware required. The system must integrate with Microsoft Active Directory and/or Microsoft Azure Active Directory. The solution provides the functionality to add recorded constituent calls to the call center on requests as a link or attachment. The City may request for a scheduled demo.

2.   DESCRIPTION OF BUSINESS NEEDS

The current CRM technology was built in-house over the course of several years. The City seeks to replace this system with a state-of-the-art technology solution and resident engagement strategies that will facilitate the City's commitment to collaboration and innovation and help citizens better connect with all that the City has to offer. There are several key drivers for this change, including:

- Increasing the profile for 311 initiatives
- Providing a comprehensive, centralized, user-friendly knowledge base
- Increasing residents' use of self-service options and digital technologies
- Creating intake scripting to provide consistent messages
- Providing a consistent approach to address residents' service requests
- Improving querying and reporting capabilities
- Improving call related measurement tools and tracking of end-to-end call flows
- Increasing efficiencies by channeling duplicate requests to a single work order

2.1 Web Portal

The City wants to use a 311 web portal to build and leverage the City's brand. As part of this project, the City expects to develop a resident web portal that will rival best-in-class private sector offerings. The need is for real-time or near real-time interactivity, integration with social media and mobility, and an intuitive, easy to navigate user interface. It should be a tool to help City employees better serve our residents and to build loyalty and trust. The focus must place a priority on making it convenient for the resident to communicate more openly with the City.

2.2 Omni-Channel Design

As part of this project, the Selected Respondent will work with the City and residents to design applications and develop a public interface for 311 that fits both the new and standard ways that citizens communicate. As the reliance on digital channels grow, the City needs to ensure consistent service delivery across all the channels. Whether residents prefer using mobile, phone, text, social media, or web self-service/email, they can submit their ideas, questions, requests, suggestions, and feedback through any channel and know that the city is listening. To enable this objective, it is critical to integrate customer service processes and data, so that City staff can work with the most comprehensive and updated resident view, regardless of which channel a resident uses.

Securing resident buy-in with the City's proposed engagement model is a critical success factor. The City's long-term partner will work with the City to design strategies for:

- Educating and informing residents about the City's CRM initiative,
- Identifying bi-directional channels to collect and process feedback,
- Developing tactics to utilize, and to build "common ground" with residents, and
- Encouraging adoption of and participation by the residents in all channels.

2.3 Transparency and Accountability

The City envisions that the new CRM system will provide extensive data that will feed various other City systems to support advanced analytics. The City seeks to forge collaborations with civic-minded technology organizations and individual developers to build applications that harness this data into relevant, accessible tools that improve the day to day life of City residents. This initiative will provide an improved platform to continue these critical initiatives.

The City expects that the new CRM technology will provide the data to drive analytics that will foster collaboration between departments with the residents and facilitate data-driven decision making and process improvements in City departments. The City's new CRM solution will leverage existing call center resources, help standardize call-taking policies and procedures, and provide the Mayor's Office, City Manager and the City Council with detailed metrics on how efficiently calls for services are being handled. It will give local elected officials the ability to monitor the delivery of services to their residents. The solution will foster accountability and allow managers to spot trends, establish customer service goals, and analyze the work of their departments to facilitate informed decision-making regarding the allocation of resources and improvements in operations, thereby improving the provision of City services to residents.

3.   SCOPE OF SERVICES/DESCRIPTION OF SERVICE NEEDS

The 311 Modernization Project encompasses CRM software and implementation services to deliver a transformative resident relationship management solution for the City of Columbus. This section details the scope of the project, including software and implementation services.

Included in this upgrade of technology the City requires a company that has an Assets Management Component or be compatible to standard Assets Management Software. Preference will be given to those vendors whose capabilities provide both a CRM System and an Assets Management System that are compatible.

3.1   CRM Software Functionality Requirements

The following is a high-level summary of general requirements for potential CRM solutions. The needs of any potential 311 solution are not limited to those listed in this document. All of these requirements are listed in further detail in the attached requirement matrices, **Attachment A**. For the purpose of this RFP, "users" designates City constituents, while "agents" designates the City and the staff of the 311 Department. "Solution" designates the 311 program.

Included in this upgrade of technology the City requires a company that has an Assets Management Component or be compatible to standard Assets Management Software. Preference will be given to those vendors whose capabilities provide both a CRM System and an Assets Management System that are compatible.

General Requirements

A - Service Request Functionality

Service Requests must be both user-friendly and highly functional. Necessary features include, but are not limited to allowing users to choose from a pre-selected group of options to make requests, allow functionality for custom requests, allow for a user to view the status of their request and allow the user to make anonymous requests. 311 agents must be able to view and sort requests using various metrics that include but are not limited to: by requester, by time period, by location or by completion status, by phone number and etc. The interface should include the ability for agents to escalate critical tasks or route tasks to other agencies if necessary. This includes automatic escalation for projects that are past due or highly critical.

The service request should be compatible with multiple channels, including in person, over the phone, e-mail, text message/SMS, smartphone applications, and through the 311 website.

B - Self Service Functionality

The solution must allow users to create editable profiles with passwords. These profiles would require email validation. These profiles would be accessible online and on mobile. The solution would also have the ability to generate contact logs based on these profiles and would also allow users to either check the status of their request or be notified by email or SMS if the status has been changed.

C - Configuration and Workflow Functionality

The solution must be easily adaptable to include the City of Columbus logo and should be customizable to ensure consistency with current city branding campaigns. The solution should contain an editable queue for different departments. Using the agent interface, agents should be able to manually change status information for pending requests.

3.2   Knowledge Base Functionality

The solution should be equipped with knowledge base functionality that is accessible by users and easily editable by agents. These interfaces should be separate (even if the information is largely similar). It should come with basic features such as preformatted article and FAQ templates, compatibility with both natural and wildcard search, the ability to rank most useful or popular knowledge base articles and usage and search metrics.

D - Report and Query Functionality

The solution must have the ability to generate reports based on performance and use indicators that are designated by the City of Columbus. Indicators may include a report of requests by completion status, customer satisfaction data, method used to generate the request, geographic 'hot spots', etc. This solution should also include the ability to display real-time analytics. These functions should be easily performed using the agent dashboard.

3.3   311 App

The solution must have the ability to allow citizens to download a 311 app which will allow citizens to view knowledge base articles, enter service requests, check status of service requests and view service requests that may have been reported. The app should be user friendly and easy to navigate.

IT Functionality Requirements

E - Data Integrity and Availability

Basic functions such as full backup, customization and real time update processing should be available without advanced programming knowledge.

This solution should be compatible with current versions of Internet Explorer, Chrome, Firefox, Safari and Edge. It should also be mobile and tablet compatible.

The solution should be capable of withstanding high-load emergency situations and must also provide both full and incremental backup capabilities. Data archiving should be an included feature, and archived data should be able to be viewed, reloaded and reported on. The solution must also provide the ability to purge data based on a pre-specified retention schedule. It is imperative that the database provided by the solution is high-performance, with fault tolerance and a robust recovery strategy that is managed and implemented by the vendor.

F - GIS Integration Functionality

The solution must be able to use the city's existing GIS data (ArcGIS) for geospatial applications. This GIS data should be easily imported and exported and users should be able to provide feedback on map quality. The solution should also have the ability to generate or incorporate a GIS map and plot it to a service request.

The solution should be able to verify the accuracy of street addresses using GIS data, while being able to discern between City and non-City locations. It also has the ability to inform users if the address entered into the address field is not recognized as a Muscogee County address.

G - Integration Capabilities

The solution must be capable of integrating with various programs that are configurable by the city. It should also operate with the current version of Microsoft SQL reporting services, SSRS. The solution must integrate with Microsoft Active Directory and/or Microsoft Azure Directory.

The solution provides both a public-facing and agent-facing API.

H - Mobile Capabilities

Mobile Field Workers

The solution should have the ability to update service requests and manage assignments from the field. Multiple users should be able to use a single mobile device. Ideally, the solution can operate in an offline mode.

Constituent Mobile Application

The mobile app for the solution provides the ability for optional anonymous reporting, access to the city's Knowledge Base, the ability to create a service request, the ability to report issues such as potholes and broken glass, the ability for users to view reports by area and check on the status of their own requests. Status updates should also be able to be pushed to mobile devices. The solution should be compatible with iOS and Android, but also preferably Blackberry and Windows as well. The mobile application should allow the user the option to attach their current GPS location and pictures to the service request.

I - Security Capabilities

The solution should encrypt user IDs and passwords and should prevent display and printing of passwords. It should also have the capability to suspend user IDs and automatically log off IDs after a certain period of inactivity.

The solution should provide the ability to maintain security policies and maintain confidential and Personally Identifiable Information. The solution should provide the ability for the vendor to perform periodic security checks, as well as provide security training for employees and contractors. It also ensures that vendor employees and contractors are required to sign a nondisclosure agreement (NDAs). The solution should also provide updates to security documentation with each new version released and there should be a single point of contact for escalation of security issues.

The solution should provide an audit trail of all system activity, including by user, date and time. It should also provide alerts for unauthorized or suspicious activity. The solution should maintain information on security events and can provide reporting on demand.

3.4 Software License Counts

The City seeks to procure licenses for Deputy City Managers, 311 Manager, 311 Coordinator, all 311 Citizens Service Center Technicians, and Department Users. There is a likelihood of growth in the City 311 division and the solution must be capable of growing and adapting to those needs with minimal service interruption.

If the Respondent would like to offer an alternative licensing model that they believe is financially beneficial to the City, they are welcome to submit that model in addition to the user licensing model requested above.

3.5 Software Integration

The software should include APIs to directly connect to multiple systems. It must be able to integrate with City systems, including but not limited to:

- ESRI/ArcGIS
- Energov

3.6 Telephony

The CRM solution must work within the context of the current telecommunications technology. The following is information regarding the existing telephony system:·

- Telecom system name - Cisco Unified Call Manager
- Software version number - 11.0.1.22900-14
- Hardware version - VMware Installation: 2 vCPU Intel(R) Xeon(R) CPU E5-2630 0 @ 2.30GHz, disk 1: 80Gbytes, disk 2: 80Gbytes, 6144Mbytes RAM

3.7 Maintenance and Support

Maintenance and support shall be provided through the subscription agreement between the Selected Respondent and the City. The maintenance agreement will not commence until the application has been placed in production and accepted by the City in writing. The maintenance agreement must provide ongoing system support and maintenance, including upgrades, bug fixes, and patches, and other technical support necessary for City staff to operate the solution, including help desk support on general system use, configuration settings, reporting, etc.

3.8   Software/System Documentation

The Selected Respondent will provide detailed system and user documentation to City staff responsible for the operation and support of the system. The Selected Respondent shall provide digital, searchable technical and user manuals to the City. Additionally, the Selected Respondent will also provide the City with complete digital, searchable system implementation documentation concerning installation, configuration, testing, interfaces, and data conversion. The Selected Respondent shall also provide PDF copies of all documentation listed above and unlimited downloads to updated copies.

The Selected Respondent shall provide, in a timely manner, system documents that describe all software in sufficient technical and functional detail, so that this information can be used by City personnel to maintain the system and resolve identified problems.

4   IMPLEMENTATION SERVICES

The City requests all necessary implementation services to provide a CRM system that meets the City's needs. Many of the required services the City wants go beyond what a "typical" CRM implementation involves. The City will not be satisfied with a standard, out of the box CRM implementation.

This section outlines the City's parameters and expectations around these implementation services and is in no way meant to delineate all of the tasks expected to complete the implementation. Respondents should consider all factors when developing their approach, implementation plan, and cost proposal. Specific detailed examples that include a coherent methodology for aligning these services with the CRM software deployment is a critical success factor. The City places a value on the delivery of these services.

4.1   Phased Implementation

Due to the volume of service requests and types, the size of the City as an organization, and the complexity within the departments, the City believes a phased approach to implementation is most appropriate. The City has identified the following three phases:

- **Phase 1 (Pilot)** – Installation and testing. Installation of open work order requests from previous system.

- **Phase 2 (Foundational Departments)** – After the pilot is concluded, the following departments will have their service requests configured and will transition to the new system: Department of Public Works, Building Codes & Enforcement, Police, Finance, Parks and Recreation and City Manager's Office.

- **Phase 3 (Remaining Departments)** – including outside agencies.

4.2   Strategic Planning

The Selected Respondent will work with the City to develop a strategy to stay ahead of the residents' demands for technology, convenience, service expectations, and relationship building. This strategy must break down the departmental silos that exist and create synergies

with work order management tools that are being deployed. In addition, the strategy must support the launch of an integrated social media and mobile platform that will accompany the CRM deployment.

The Selected Respondent will work with the City to identify bi-directional channels to collect and process feedback and to develop tactics to utilize to build "common ground" with residents. Whether residents prefer using mobile, phone, text, social media, or web self-service/email, they can submit their ideas, questions, requests, suggestions, and feedback through any channel and know that the City is listening and will respond. As the reliance on digital channels grows, the City needs to ensure consistent service delivery across all communications channels and strive towards multi-channel service consistency. To enable this objective, it is critical for the Selected Respondent to integrate customer service processes and data, so that agents work with the most comprehensive and updated resident view, regardless of which channel they use.

4.3 Education and Outreach

The City values an innovative approach to educating their residents and requires the Selected Respondent to develop an education and outreach campaign and a method and means to measure the effectiveness of the education and outreach campaign. This will include specific steps and tactics to collect, measure, and monitor resident satisfaction with the new CRM solution, and a plan to leverage this information to update, if applicable, the outreach strategy.

Ultimately, the City wants a 360-degree view of the resident while ensuring that all relevant privacy and security guidelines are followed. The City believes that by understanding more about the unique needs of their residents, they will be able to provide an elevated level of service by anticipating resident needs instead of merely reacting to them.

4.4 Duplicate Detection

Accurate duplicate detection and creating relationships among service requests is critical functionality for the City. Different service types have different duplication variables. The Selected Respondent will need to work with City subject matter experts to define the most appropriate duplication detection algorithms for high volume request types.

4.5 City GIS - ArcGIS

There are many GIS layers that the City has identified as being useful for identifying the appropriate service request type, pin-pointing the exact location for a service request, providing information for resident status reports, and providing useful information to work crews for more efficient fulfillment.

4.6 Knowledge Base Design, Organization, and Implementation

The City's current CRM system does not include a knowledge base system. The Selected Respondent will work with City subject matter experts to design, organize, and implement the solution's knowledge base.

The City intends to develop two separate knowledge base views: resident-facing and internal (City-use) only. While the content may be substantively identical, it is critical that the two separate views of the knowledge base be developed and maintained.

The Selected Respondent will work with identified City staff to develop policies, procedures, and protocol for maintaining the knowledge base after implementation.

4.7   Scripting

Currently the City's 311 agents have very limited call scripting capabilities that are utilized when processing incoming resident requests. The Selected Respondent will develop detailed call scripting to provide a consistent, uniform experience to callers as the 311 Call Center is the primary channel residents currently use to communicate with the City.

4.8   Custom Reporting

The City anticipates the need for robust and customizable reporting.

4.9   Configuration, Testing, and Acceptance

The Respondent will be required to detail for the City the potential configuration options that are available to meet the requirements.

The Respondent will be required to produce a configuration document as a project deliverable prior to the system's final configuration.

The Respondent will be required to configure all necessary proposed functionality for the City and is expected to work closely with the City's functional experts to finalize the configurations and transfer knowledge.

The Respondent will be required to provide a testing strategy and plan (including scripts) as a project deliverable to the City. The final testing plan will be signed off by the City prior to the execution of tests.

The Respondent should provide four system environments: development/configuration, testing, training, and production.

The Selected Respondent will work with the City to ensure that at the time of cutover, the system is functioning with performance superior to that of the current CRM system.

5   TRAINING AND KNOWLEDGE TRANSFER

5.1   Training Plan

The Selected Respondent shall provide the City with a comprehensive training program that includes instructor-led training to facilitate successful implementation and knowledge transfer of the proposed CRM solution. The City is interested in training services that use employee time efficiently and effectively transfers practical knowledge about the use of the new CRM solution. The Respondent shall propose an approach that includes significant opportunity for knowledge

transfer throughout implementation and enhanced system understanding by the use and development of "in-house trainers."

6   ADA COMPLIANCE

The 311 web portal must be compliant with Section 508 of the American with Disabilities Act.

7   SOCIAL MEDIA INTEGRATION

The City would like the Selected Respondent to build applications for:
- Facebook
- Twitter
- 311 App

The API for these items will be provided by the City. This solution should also contain the capability to integrate new social media platforms as they emerge.

8   CHANGE MANAGEMENT

Employees have been using existing processes for many years. The City understands the importance of change management services to the successful implementation of the CRM solution. The City intends to select a vendor to deliver these services under a separate procurement. While change management services are outside the scope of this procurement, the Selected Respondent will be required to work closely with the City's change management vendor to ensure systemic adoption of the new solution.

APPENDIX B

TECHNICAL SPECIFICATIONS & FUNCTIONAL REQUIREMENTS
Asset Management System
(OPTION 1)

I.   System Objectives and Project Scope

Provide an Asset Management System and its related installation, conversion, migration, training, and implementation services. It is the City's preference to enter into an agreement with a single vendor who can provide the complete range of required functionality, and related services.

II.   Minimal Vendor Requirements

Vendors submitting in response to this RFP must meet the following requirements:

- Possess a solid customer base using the Vendor's software.
- Demonstrate successful experience implementing the proposed software.
- Meet all functional and technical requirements stated within this RFP using commercial off-the-shelf software.
- An intuitive system from a user perspective and can position the City to take advantage of technology to improve departmental performance and efficiency.
- Easy access to the data for report and query generation without the need for a programming specialist.
- Provide solutions for user-friendly mobile technology for field crews.
- Provide spatial capabilities through industry-standard GIS to augment Operations Management activities.
- Asset tracking for specific assets, including the ability to track attributes, work and maintenance history, cost of maintaining the asset, and asset lifecycle management.
- The successful vendor shall be responsible for the final City-approved design, installation, implementation, and commissioning of the software system including development of user acceptance testing, system integration, and connectivity to existing resources.

The Organization will consider proposals from single suppliers or from multiple suppliers working as a team. In the event multiple suppliers submit a proposal together, the Organization expects that there will be one primary contact who will be responsible for the whole project and for coordinating the work of the other suppliers.

III.   Minimal Software Requirements

The following represents an overview of the essential software requirements:

A. Request Management

1. Intake requests from citizens and staff
2. Provide multiple ways to take requests (smartphone, phone call, website, etc.)
3. Provide a way to avoid duplicate or redundant requests
4. Associate multiple tasks and work orders to requests

B. Work Management
1. Create and complete work on both assets and non-assets
2. Easily create, assign, prioritize, and complete work activities
3. Roll-up of work activities for project level costing and tracking
4. Project activities with their cost, to maximize the live of assets
5. Auto notification via email related to assigned and completed work

C. Asset Management
1. Ability to create asset inventories and track asset attributes
2. Assets contain performance curves to track asset condition, criticality, and useful life
3. Document inspection results which impact asset condition
4. Setup preventative maintenance schedules on assets and trigger work based on asset condition, time, and usage
5. Ability to create custom assets
6. Associate asset to requests and work

D. Resource Management
1. Ability to track labor, equipment, and materials costs
2. Allow for multiple labor rates
3. Ability to expense equipment in either time or miles
4. Materials inventory management with quantity on hand and adjustable settings
5. Manage materials based on location
6. Bulk order, order tracking, and material location transfer
7. Auto notifications via email for material reorder alerts
8. Mobile/Field Access
   a. Native iPad application to perform request tracking, work, and inventory assets in the field
   b. Native iOS and Android smartphone application to perform work and inventory assets in the field
   c. Mobile application must be able to create and complete work, enter resources, create assets, and edit existing assets and attributes
   d. Offline capability for iPad application
   e. Configure data available in application
   f. Ability to use a variety of base maps

E. Reporting and Exporting Data
1. Standard reports included
2. Create and edit Reports
3. Allow for export to CSV
4. Ability for field-level queries, sorts, and reports.

VENDOR INFORMATION REGARDING
GEORGIA SECURITY AND IMMIGRATION COMPLIANCE
and
House Bill 87, also known as, The Illegal Immigration Reform and Enforcement Act of 2011

Section 3 of House Bill 87 amends O.C.G.A. §13-10-91. O.C.G.A. §13-10-91(b)(1) states, in part, "A public employer shall not enter into a contract … for the physical performance of services unless the contractor registers and participates in the federal work authorization program."

Accordingly, the affidavits on the pages that follow relate to documentation you must provide the City.

All contractors must complete the attached "CONTRACTOR AFFIDAVIT"****. Additionally, if you utilize subcontractors, they must complete the "SUBCONTRACTOR AFFIDAVIT" and or the "SUB-SUBCONTRACTOR AFFIDAVIT."

***In lieu of the affidavit required by this subsection, a contractor, subcontractor, or sub-subcontractor who has no employees and does not hire or intend to hire employees for purposes of satisfying or completing the terms and conditions of any part or all of the original contract with the public employer shall instead provide a copy of the state issued driver's license or state issued identification card of such contracting party and a copy of the state issued driver's license or identification card of each independent contractor utilized in the satisfaction of part or all of the original contract with a public employer. A driver's license or identification card shall only be accepted in lieu of an affidavit if it is issued by a state within the United States and such state verifies lawful immigration status prior to issuing a driver's license or identification card.

See https://e-verify.uscis.gov/emp/vislogin.aspx?JS=YES to access your E-Verify Company Identification Number.

Information is available at: http://www.dol.state.ga.us/spotlight/sp_sb_529_new_rules.htm

FORM 1

CONTRACTOR AFFIDAVIT
E-VERIFY / GEORGIA SECURITY & IMMIGRATION COMPLIANCE ACT

By executing this affidavit, the undersigned contractor verifies its compliance with O.C.G.A. § 13-10-91, stating affirmatively that the individual, firm or corporation which is engaged in the physical performance of services on behalf of *Columbus Consolidated Government* has registered with, is authorized to use and uses the federal work authorization program commonly known as E-Verify, or any subsequent replacement program, in accordance with the applicable provisions and deadlines established in O.C.G.A. § 13-10-91. Furthermore, the undersigned contractor will continue to use the federal work authorization program throughout the contract period and the undersigned contractor will contract for the physical performance of services in satisfaction of such contract only with subcontractors who present an affidavit to the contractor with the information required by O.C.G.A. § 13-10-91(b). Contractor hereby attests that its federal work authorization user identification number and date of authorization are as follows:

_____

Company ID Number *(numerical, 4-7 digits)*   Date of Authorization
See https://e-verify.uscis.gov/emp/vislogin.aspx?JS=YES to access your E-Verify Company Identification Number.

_____

Name of Contractor

Constituent Relationship Management (311) System – RFP No. 19-0009
Name of Project

Columbus Consolidated Government
Name of Public Employer

I hereby declare under penalty of perjury that the foregoing is true and correct.

Executed on _____, ___, 20__ in _____ (city), _____(state).

_____

Signature of Authorized Officer or Agent

_____

Printed Name and Title of Authorized Officer or Agent

Subscribed and sworn before me on this the ___ day of _____,201___.

_____

NOTARY PUBLIC

My Commission Expires:

_____

A properly completed, notarized E-Verify Affidavit must be included with sealed proposal; failure to do so will render the firm's proposal non-responsive and ineligible for further consideration.

FORM 2

INSURANCE CHECKLIST

CONSTITUENT RELATIONSHIP MANAGEMENT (311) SYSTEM
RFP NO. 19-0009

CERTIFICATE OF INSURANCE MUST SHOW ALL COVERAGE
AND ENDORSEMENTS INDICATED BY "X"
CSL = Combined Single Limit; BI = Bodily Injury; PD=Property Damage

	Required Coverage(s)	Limits (Figures denote minimums)	Bidders Limits/Response
X	1. Worker's Compensation and Employer's Liability	STATUTORY REQUIREMENTS	
	Comprehensive General Liability		
X	2. General Liability Premises/Operations	$1 Million CSL BI/PD each occurrence, $1 Million annual aggregate	
X	3. Independent Contractors and Sub - Contractors	$1 Million CSL BI/PD each occurrence, $1 Million annual aggregate	
X	4. Products Liability	$1 Million CSL BI/PD each occurrence, $1 Million annual aggregate	
	5. Completed Operations	$1 Million CSL BI/PD each occurrence, $1 Million annual aggregate	
	6. Contractual Liability (Must be shown on Certificate)	$ 1 Million CSL BI/PD each occurrence, $1 Million annual aggregate	
	Automobile Liability		
X	7. *Owned/Hired/Non-Owned Vehicles/ Employer non ownership	$1 Million BI/PD each Accident, Uninsured Motorist	
	Others		
X	8. Miscellaneous Errors and Omissions	$1 Million per occurrence/claim	
	9. Umbrella/Excess Liability	$1 Million Bodily Injury, Property Damage and Personal Injury	
X	10. Personal and Advertising Injury Liability	$1 Million each offense, $1 Million annual aggregate	
X	11. Professional Liability	$1 Million per occurrence/claim	
	12. Architects and Engineers	$1 Million per occurrence/claim	
	13. Asbestos Removal Liability	$2 Million per occurrence/claim	
	14. Medical Malpractice	$1 Million per occurrence/claim	
	15. Medical Professional Liability	$1 Million per occurrence/claim	
	16. Dishonesty Bond		
	17. Builder's Risk	Provide Coverage in the full amount of contract	
	18. XCU (Explosive, Collapse, Underground) Coverage		

	Required Coverage(s)	Limits (Figures denote minimums)	Bidders Limits/Response
	19. USL&H (Long Shore Harbor Worker's Compensation Act)		
	20. Contractor Pollution Liability	$2 Million per occurrence/claim	
	21. Environmental Impairment Liability	$2 Million per occurrence/claim	
X	22. Carrier Rating shall be Best's Rating of A-VII or its equivalents		
X	23. Notice of Cancellation, non-renewal or material change in coverage shall be provided to City at least 30 days prior to action.		
X	24. The City shall be named Additional Insured on all policies		
X	25. Certificate of Insurance shall show Bid Number and Bid Title		
	26. Pollution:	$2 Million per occurrence/claim	

*If offeror's employees will be using their privately owned vehicles while working on this contract and are privately insured, please state that fact in the **Bidders Limits/Response column of the insurance checklist.

BIDDER'S STATEMENT:

If awarded the contract, I will comply with contract insurance requirements.

BIDDER NAME: _____

AUTHORIZED SIGNATURE:_____

FORM 3

Form **W-9**
(Rev. October 2018)
Department of the Treasury
Internal Revenue Service

**Request for Taxpayer
Identification Number and Certification**

▶ Go to *www.irs.gov/FormW9* for instructions and the latest information.

**Give Form to the
requester. Do not
send to the IRS.**

Print or type.
See Specific Instructions on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only **one** of the following seven boxes.

☐ Individual/sole proprietor or single-member LLC ☐ C Corporation ☐ S Corporation ☐ Partnership ☐ Trust/estate

☐ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____

Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is **not** disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

☐ Other (see instructions) ▶

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) _____

Exemption from FATCA reporting code (if any) _____

(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.

6 City, state, and ZIP code

Requester's name and address (optional)

7 List account number(s) here (optional)

Part I   **Taxpayer Identification Number (TIN)**

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN,* later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number

☐☐☐ – ☐☐ – ☐☐☐☐

or

Employer identification number

☐☐ – ☐☐☐☐☐☐☐

Part II   **Certification**

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and

2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and

3. I am a U.S. citizen or other U.S. person (defined below); and

4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here

Signature of U.S. person ▶   Date ▶

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to *www.irs.gov/FormW9*.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

• Form 1099-INT (interest earned or paid)

• Form 1099-DIV (dividends, including those from stocks or mutual funds)

• Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)

• Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)

• Form 1099-S (proceeds from real estate transactions)

• Form 1099-K (merchant card and third party network transactions)

• Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)

• Form 1099-C (canceled debt)

• Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.

Cat. No. 10231X   Form **W-9** (Rev. 10-2018)

By signing the filled-out form, you:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),

2. Certify that you are not subject to backup withholding, or

3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income, and

4. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct. See *What is FATCA reporting,* later, for further information.

Note: If you are a U.S. person and a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

• An individual who is a U.S. citizen or U.S. resident alien;

• A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States;

• An estate (other than a foreign estate); or

• A domestic trust (as defined in Regulations section 301.7701-7).

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax under section 1446 on any foreign partners' share of effectively connected taxable income from such business. Further, in certain cases where a Form W-9 has not been received, the rules under section 1446 require a partnership to presume that a partner is a foreign person, and pay the section 1446 withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid section 1446 withholding on your share of partnership income.

In the cases below, the following person must give Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States.

• In the case of a disregarded entity with a U.S. owner, the U.S. owner of the disregarded entity and not the entity;

• In the case of a grantor trust with a U.S. grantor or other U.S. owner, generally, the U.S. grantor or other U.S. owner of the grantor trust and not the trust; and

• In the case of a U.S. trust (other than a grantor trust), the U.S. trust (other than a grantor trust) and not the beneficiaries of the trust.

Foreign person. If you are a foreign person or the U.S. branch of a foreign bank that has elected to be treated as a U.S. person, do not use Form W-9. Instead, use the appropriate Form W-8 or Form 8233 (see Pub. 515, Withholding of Tax on Nonresident Aliens and Foreign Entities).

Nonresident alien who becomes a resident alien. Generally, only a nonresident alien individual may use the terms of a tax treaty to reduce or eliminate U.S. tax on certain types of income. However, most tax treaties contain a provision known as a "saving clause." Exceptions specified in the saving clause may permit an exemption from tax to continue for certain types of income even after the payee has otherwise become a U.S. resident alien for tax purposes.

If you are a U.S. resident alien who is relying on an exception contained in the saving clause of a tax treaty to claim an exemption from U.S. tax on certain types of income, you must attach a statement to Form W-9 that specifies the following five items.

1. The treaty country. Generally, this must be the same treaty under which you claimed exemption from tax as a nonresident alien.

2. The treaty article addressing the income.

3. The article number (or location) in the tax treaty that contains the saving clause and its exceptions.

4. The type and amount of income that qualifies for the exemption from tax.

5. Sufficient facts to justify the exemption from tax under the terms of the treaty article.

Example. Article 20 of the U.S.-China income tax treaty allows an exemption from tax for scholarship income received by a Chinese student temporarily present in the United States. Under U.S. law, this student will become a resident alien for tax purposes if his or her stay in the United States exceeds 5 calendar years. However, paragraph 2 of the first Protocol to the U.S.-China treaty (dated April 30, 1984) allows the provisions of Article 20 to continue to apply even after the Chinese student becomes a resident alien of the United States. A Chinese student who qualifies for this exception (under paragraph 2 of the first protocol) and is relying on this exception to claim an exemption from tax on his or her scholarship or fellowship income would attach to Form W-9 a statement that includes the information described above to support that exemption.

If you are a nonresident alien or a foreign entity, give the requester the appropriate completed Form W-8 or Form 8233.

Backup Withholding

What is backup withholding? Persons making certain payments to you must under certain conditions withhold and pay to the IRS 24% of such payments. This is called "backup withholding." Payments that may be subject to backup withholding include interest, tax-exempt interest, dividends, broker and barter exchange transactions, rents, royalties, nonemployee pay, payments made in settlement of payment card and third party network transactions, and certain payments from fishing boat operators. Real estate transactions are not subject to backup withholding.

You will not be subject to backup withholding on payments you receive if you give the requester your correct TIN, make the proper certifications, and report all your taxable interest and dividends on your tax return.

Payments you receive will be subject to backup withholding if:

1. You do not furnish your TIN to the requester,

2. You do not certify your TIN when required (see the instructions for Part II for details),

3. The IRS tells the requester that you furnished an incorrect TIN,

4. The IRS tells you that you are subject to backup withholding because you did not report all your interest and dividends on your tax return (for reportable interest and dividends only), or

5. You do not certify to the requester that you are not subject to backup withholding under 4 above (for reportable interest and dividend accounts opened after 1983 only).

Certain payees and payments are exempt from backup withholding. See *Exempt payee code,* later, and the separate Instructions for the Requester of Form W-9 for more information.

Also see *Special rules for partnerships,* earlier.

What is FATCA Reporting?

The Foreign Account Tax Compliance Act (FATCA) requires a participating foreign financial institution to report all United States account holders that are specified United States persons. Certain payees are exempt from FATCA reporting. See *Exemption from FATCA reporting code,* later, and the Instructions for the Requester of Form W-9 for more information.

Updating Your Information

You must provide updated information to any person to whom you claimed to be an exempt payee if you are no longer an exempt payee and anticipate receiving reportable payments in the future from this person. For example, you may need to provide updated information if you are a C corporation that elects to be an S corporation, or if you no longer are tax exempt. In addition, you must furnish a new Form W-9 if the name or TIN changes for the account; for example, if the grantor of a grantor trust dies.

Penalties

Failure to furnish TIN. If you fail to furnish your correct TIN to a requester, you are subject to a penalty of $50 for each such failure unless your failure is due to reasonable cause and not to willful neglect.

Civil penalty for false information with respect to withholding. If you make a false statement with no reasonable basis that results in no backup withholding, you are subject to a $500 penalty.

Criminal penalty for falsifying information. Willfully falsifying certifications or affirmations may subject you to criminal penalties including fines and/or imprisonment.

Misuse of TINs. If the requester discloses or uses TINs in violation of federal law, the requester may be subject to civil and criminal penalties.

Specific Instructions

Line 1

You must enter one of the following on this line; **do not** leave this line blank. The name should match the name on your tax return.

If this Form W-9 is for a joint account (other than an account maintained by a foreign financial institution (FFI)), list first, and then circle, the name of the person or entity whose number you entered in Part I of Form W-9. If you are providing Form W-9 to an FFI to document a joint account, each holder of the account that is a U.S. person must provide a Form W-9.

a. **Individual.** Generally, enter the name shown on your tax return. If you have changed your last name without informing the Social Security Administration (SSA) of the name change, enter your first name, the last name as shown on your social security card, and your new last name.

Note: ITIN applicant: Enter your individual name as it was entered on your Form W-7 application, line 1a. This should also be the same as the name you entered on the Form 1040/1040A/1040EZ you filed with your application.

b. **Sole proprietor or single-member LLC.** Enter your individual name as shown on your 1040/1040A/1040EZ on line 1. You may enter your business, trade, or "doing business as" (DBA) name on line 2.

c. **Partnership, LLC that is not a single-member LLC, C corporation, or S corporation.** Enter the entity's name as shown on the entity's tax return on line 1 and any business, trade, or DBA name on line 2.

d. **Other entities.** Enter your name as shown on required U.S. federal tax documents on line 1. This name should match the name shown on the charter or other legal document creating the entity. You may enter any business, trade, or DBA name on line 2.

e. **Disregarded entity.** For U.S. federal tax purposes, an entity that is disregarded as an entity separate from its owner is treated as a "disregarded entity." See Regulations section 301.7701-2(c)(2)(iii). Enter the owner's name on line 1. The name of the entity entered on line 1 should never be a disregarded entity. The name on line 1 should be the name shown on the income tax return on which the income should be reported. For example, if a foreign LLC that is treated as a disregarded entity for U.S. federal tax purposes has a single owner that is a U.S. person, the U.S. owner's name is required to be provided on line 1. If the direct owner of the entity is also a disregarded entity, enter the first owner that is not disregarded for federal tax purposes. Enter the disregarded entity's name on line 2, "Business name/disregarded entity name." If the owner of the disregarded entity is a foreign person, the owner must complete an appropriate Form W-8 instead of a Form W-9. This is the case even if the foreign person has a U.S. TIN.

Line 2

If you have a business name, trade name, DBA name, or disregarded entity name, you may enter it on line 2.

Line 3

Check the appropriate box on line 3 for the U.S. federal tax classification of the person whose name is entered on line 1. Check only one box on line 3.

IF the entity/person on line 1 is a(n) . . .	THEN check the box for . . .
• Corporation	Corporation
• Individual • Sole proprietorship, or • Single-member limited liability company (LLC) owned by an individual and disregarded for U.S. federal tax purposes.	Individual/sole proprietor or single-member LLC
• LLC treated as a partnership for U.S. federal tax purposes, • LLC that has filed Form 8832 or 2553 to be taxed as a corporation, or • LLC that is disregarded as an entity separate from its owner but the owner is another LLC that is not disregarded for U.S. federal tax purposes.	Limited liability company and enter the appropriate tax classification. (P= Partnership; C= C corporation; or S= S corporation)
• Partnership	Partnership
• Trust/estate	Trust/estate

Line 4, Exemptions

If you are exempt from backup withholding and/or FATCA reporting, enter in the appropriate space on line 4 any code(s) that may apply to you.

Exempt payee code.

• Generally, individuals (including sole proprietors) are not exempt from backup withholding.

• Except as provided below, corporations are exempt from backup withholding for certain payments, including interest and dividends.

• Corporations are not exempt from backup withholding for payments made in settlement of payment card or third party network transactions.

• Corporations are not exempt from backup withholding with respect to attorneys' fees or gross proceeds paid to attorneys, and corporations that provide medical or health care services are not exempt with respect to payments reportable on Form 1099-MISC.

The following codes identify payees that are exempt from backup withholding. Enter the appropriate code in the space in line 4.

1—An organization exempt from tax under section 501(a), any IRA, or a custodial account under section 403(b)(7) if the account satisfies the requirements of section 401(f)(2)

2—The United States or any of its agencies or instrumentalities

3—A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities

4—A foreign government or any of its political subdivisions, agencies, or instrumentalities

5—A corporation

6—A dealer in securities or commodities required to register in the United States, the District of Columbia, or a U.S. commonwealth or possession

7—A futures commission merchant registered with the Commodity Futures Trading Commission

8—A real estate investment trust

9—An entity registered at all times during the tax year under the Investment Company Act of 1940

10—A common trust fund operated by a bank under section 584(a)

11—A financial institution

12—A middleman known in the investment community as a nominee or custodian

13—A trust exempt from tax under section 664 or described in section 4947

The following chart shows types of payments that may be exempt from backup withholding. The chart applies to the exempt payees listed above, 1 through 13.

IF the payment is for ...	THEN the payment is exempt for ...
Interest and dividend payments	All exempt payees except for 7
Broker transactions	Exempt payees 1 through 4 and 6 through 11 and all C corporations. S corporations must not enter an exempt payee code because they are exempt only for sales of noncovered securities acquired prior to 2012.
Barter exchange transactions and patronage dividends	Exempt payees 1 through 4
Payments over $600 required to be reported and direct sales over $5,000[1]	Generally, exempt payees 1 through 5[2]
Payments made in settlement of payment card or third party network transactions	Exempt payees 1 through 4

[1] See Form 1099-MISC, Miscellaneous Income, and its instructions.

[2] However, the following payments made to a corporation and reportable on Form 1099-MISC are not exempt from backup withholding: medical and health care payments, attorneys' fees, gross proceeds paid to an attorney reportable under section 6045(f), and payments for services paid by a federal executive agency.

Exemption from FATCA reporting code. The following codes identify payees that are exempt from reporting under FATCA. These codes apply to persons submitting this form for accounts maintained outside of the United States by certain foreign financial institutions. Therefore, if you are only submitting this form for an account you hold in the United States, you may leave this field blank. Consult with the person requesting this form if you are uncertain if the financial institution is subject to these requirements. A requester may indicate that a code is not required by providing you with a Form W-9 with "Not Applicable" (or any similar indication) written or printed on the line for a FATCA exemption code.

A—An organization exempt from tax under section 501(a) or any individual retirement plan as defined in section 7701(a)(37)

B—The United States or any of its agencies or instrumentalities

C—A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities

D—A corporation the stock of which is regularly traded on one or more established securities markets, as described in Regulations section 1.1472-1(c)(1)(i)

E—A corporation that is a member of the same expanded affiliated group as a corporation described in Regulations section 1.1472-1(c)(1)(i)

F—A dealer in securities, commodities, or derivative financial instruments (including notional principal contracts, futures, forwards, and options) that is registered as such under the laws of the United States or any state

G—A real estate investment trust

H—A regulated investment company as defined in section 851 or an entity registered at all times during the tax year under the Investment Company Act of 1940

I—A common trust fund as defined in section 584(a)

J—A bank as defined in section 581

K—A broker

L—A trust exempt from tax under section 664 or described in section 4947(a)(1)

M—A tax exempt trust under a section 403(b) plan or section 457(g) plan

Note: You may wish to consult with the financial institution requesting this form to determine whether the FATCA code and/or exempt payee code should be completed.

Line 5

Enter your address (number, street, and apartment or suite number). This is where the requester of this Form W-9 will mail your information returns. If this address differs from the one the requester already has on file, write NEW at the top. If a new address is provided, there is still a chance the old address will be used until the payor changes your address in their records.

Line 6

Enter your city, state, and ZIP code.

Part I. Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. If you are a resident alien and you do not have and are not eligible to get an SSN, your TIN is your IRS individual taxpayer identification number (ITIN). Enter it in the social security number box. If you do not have an ITIN, see *How to get a TIN* below.

If you are a sole proprietor and you have an EIN, you may enter either your SSN or EIN.

If you are a single-member LLC that is disregarded as an entity separate from its owner, enter the owner's SSN (or EIN, if the owner has one). Do not enter the disregarded entity's EIN. If the LLC is classified as a corporation or partnership, enter the entity's EIN.

Note: See *What Name and Number To Give the Requester,* later, for further clarification of name and TIN combinations.

How to get a TIN. If you do not have a TIN, apply for one immediately. To apply for an SSN, get Form SS-5, Application for a Social Security Card, from your local SSA office or get this form online at *www.SSA.gov*. You may also get this form by calling 1-800-772-1213. Use Form W-7, Application for IRS Individual Taxpayer Identification Number, to apply for an ITIN, or Form SS-4, Application for Employer Identification Number, to apply for an EIN. You can apply for an EIN online by accessing the IRS website at *www.irs.gov/Businesses* and clicking on Employer Identification Number (EIN) under Starting a Business. Go to *www.irs.gov/Forms* to view, download, or print Form W-7 and/or Form SS-4. Or, you can go to *www.irs.gov/OrderForms* to place an order and have Form W-7 and/or SS-4 mailed to you within 10 business days.

If you are asked to complete Form W-9 but do not have a TIN, apply for a TIN and write "Applied For" in the space for the TIN, sign and date the form, and give it to the requester. For interest and dividend payments, and certain payments made with respect to readily tradable instruments, generally you will have 60 days to get a TIN and give it to the requester before you are subject to backup withholding on payments. The 60-day rule does not apply to other types of payments. You will be subject to backup withholding on all such payments until you provide your TIN to the requester.

Note: Entering "Applied For" means that you have already applied for a TIN or that you intend to apply for one soon.

Caution: A disregarded U.S. entity that has a foreign owner must use the appropriate Form W-8.

Part II. Certification

To establish to the withholding agent that you are a U.S. person, or resident alien, sign Form W-9. You may be requested to sign by the withholding agent even if item 1, 4, or 5 below indicates otherwise.

For a joint account, only the person whose TIN is shown in Part I should sign (when required). In the case of a disregarded entity, the person identified on line 1 must sign. Exempt payees, see *Exempt payee code,* earlier.

Signature requirements. Complete the certification as indicated in items 1 through 5 below.

1. **Interest, dividend, and barter exchange accounts opened before 1984 and broker accounts considered active during 1983.** You must give your correct TIN, but you do not have to sign the certification.

2. **Interest, dividend, broker, and barter exchange accounts opened after 1983 and broker accounts considered inactive during 1983.** You must sign the certification or backup withholding will apply. If you are subject to backup withholding and you are merely providing your correct TIN to the requester, you must cross out item 2 in the certification before signing the form.

3. **Real estate transactions.** You must sign the certification. You may cross out item 2 of the certification.

4. **Other payments.** You must give your correct TIN, but you do not have to sign the certification unless you have been notified that you have previously given an incorrect TIN. "Other payments" include payments made in the course of the requester's trade or business for rents, royalties, goods (other than bills for merchandise), medical and health care services (including payments to corporations), payments to a nonemployee for services, payments made in settlement of payment card and third party network transactions, payments to certain fishing boat crew members and fishermen, and gross proceeds paid to attorneys (including payments to corporations).

5. **Mortgage interest paid by you, acquisition or abandonment of secured property, cancellation of debt, qualified tuition program payments (under section 529), ABLE accounts (under section 529A), IRA, Coverdell ESA, Archer MSA or HSA contributions or distributions, and pension distributions.** You must give your correct TIN, but you do not have to sign the certification.

What Name and Number To Give the Requester

For this type of account:	Give name and SSN of:
1. Individual	The individual
2. Two or more individuals (joint account) other than an account maintained by an FFI	The actual owner of the account or, if combined funds, the first individual on the account[1]
3. Two or more U.S. persons (joint account maintained by an FFI)	Each holder of the account
4. Custodial account of a minor (Uniform Gift to Minors Act)	The minor[2]
5. a. The usual revocable savings trust (grantor is also trustee)	The grantor-trustee[1]
b. So-called trust account that is not a legal or valid trust under state law	The actual owner[1]
6. Sole proprietorship or disregarded entity owned by an individual	The owner[3]
7. Grantor trust filing under Optional Form 1099 Filing Method 1 (see Regulations section 1.671-4(b)(2)(i)(A))	The grantor*

For this type of account:	Give name and EIN of:
8. Disregarded entity not owned by an individual	The owner
9. A valid trust, estate, or pension trust	Legal entity[4]
10. Corporation or LLC electing corporate status on Form 8832 or Form 2553	The corporation
11. Association, club, religious, charitable, educational, or other tax-exempt organization	The organization
12. Partnership or multi-member LLC	The partnership
13. A broker or registered nominee	The broker or nominee

For this type of account:	Give name and EIN of:
14. Account with the Department of Agriculture in the name of a public entity (such as a state or local government, school district, or prison) that receives agricultural program payments	The public entity
15. Grantor trust filing under the Form 1041 Filing Method or the Optional Form 1099 Filing Method 2 (see Regulations section 1.671-4(b)(2)(i)(B))	The trust

[1] List first and circle the name of the person whose number you furnish. If only one person on a joint account has an SSN, that person's number must be furnished.

[2] Circle the minor's name and furnish the minor's SSN.

[3] You must show your individual name and you may also enter your business or DBA name on the "Business name/disregarded entity" name line. You may use either your SSN or EIN (if you have one), but the IRS encourages you to use your SSN.

[4] List first and circle the name of the trust, estate, or pension trust. (Do not furnish the TIN of the personal representative or trustee unless the legal entity itself is not designated in the account title.) Also see *Special rules for partnerships,* earlier.

*Note: The grantor also must provide a Form W-9 to trustee of trust.

Note: If no name is circled when more than one name is listed, the number will be considered to be that of the first name listed.

Secure Your Tax Records From Identity Theft

Identity theft occurs when someone uses your personal information such as your name, SSN, or other identifying information, without your permission, to commit fraud or other crimes. An identity thief may use your SSN to get a job or may file a tax return using your SSN to receive a refund.

To reduce your risk:

• Protect your SSN,

• Ensure your employer is protecting your SSN, and

• Be careful when choosing a tax preparer.

If your tax records are affected by identity theft and you receive a notice from the IRS, respond right away to the name and phone number printed on the IRS notice or letter.

If your tax records are not currently affected by identity theft but you think you are at risk due to a lost or stolen purse or wallet, questionable credit card activity or credit report, contact the IRS Identity Theft Hotline at 1-800-908-4490 or submit Form 14039.

For more information, see Pub. 5027, Identity Theft Information for Taxpayers.

Victims of identity theft who are experiencing economic harm or a systemic problem, or are seeking help in resolving tax problems that have not been resolved through normal channels, may be eligible for Taxpayer Advocate Service (TAS) assistance. You can reach TAS by calling the TAS toll-free case intake line at 1-877-777-4778 or TTY/TDD 1-800-829-4059.

Protect yourself from suspicious emails or phishing schemes. Phishing is the creation and use of email and websites designed to mimic legitimate business emails and websites. The most common act is sending an email to a user falsely claiming to be an established legitimate enterprise in an attempt to scam the user into surrendering private information that will be used for identity theft.

The IRS does not initiate contacts with taxpayers via emails. Also, the IRS does not request personal detailed information through email or ask taxpayers for the PIN numbers, passwords, or similar secret access information for their credit card, bank, or other financial accounts.

If you receive an unsolicited email claiming to be from the IRS, forward this message to *phishing@irs.gov*. You may also report misuse of the IRS name, logo, or other IRS property to the Treasury Inspector General for Tax Administration (TIGTA) at 1-800-366-4484. You can forward suspicious emails to the Federal Trade Commission at *spam@uce.gov* or report them at *www.ftc.gov/complaint*. You can contact the FTC at *www.ftc.gov/idtheft* or 877-IDTHEFT (877-438-4338). If you have been the victim of identity theft, see *www.IdentityTheft.gov* and Pub. 5027.

Visit *www.irs.gov/IdentityTheft* to learn more about identity theft and how to reduce your risk.

Privacy Act Notice

Section 6109 of the Internal Revenue Code requires you to provide your correct TIN to persons (including federal agencies) who are required to file information returns with the IRS to report interest, dividends, or certain other income paid to you; mortgage interest you paid; the acquisition or abandonment of secured property; the cancellation of debt; or contributions you made to an IRA, Archer MSA, or HSA. The person collecting this form uses the information on the form to file information returns with the IRS, reporting the above information. Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation and to cities, states, the District of Columbia, and U.S. commonwealths and possessions for use in administering their laws. The information also may be disclosed to other countries under a treaty, to federal and state agencies to enforce civil and criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism. You must provide your TIN whether or not you are required to file a tax return. Under section 3406, payers must generally withhold a percentage of taxable interest, dividend, and certain other payments to a payee who does not give a TIN to the payer. Certain penalties may also apply for providing false or fraudulent information.

FORM 4

CLIENT WORK HISTORY

Provide details of the *last five* (5) entities for which similar systems and services have been provided within the last five (5) years. The City reserves the right to contact additional clients not listed.

Client Name:	Contract Begin Date:
Contact Name:	Contract End Date:
Address:	Telephone:
	E-Mail Address:
Systems and Services Provided:	

Client Name:	Contract Begin Date:
Contact Name:	Contract End Date:
Address:	Telephone:
	E-Mail Address:
Systems and Services Provided:	

Client Name:	Contract Begin Date:
Contact Name:	Contract End Date:
Address:	Telephone:
	E-Mail Address:
Systems and Services Provided:	

Client Name:	Contract Begin Date:
Contact Name:	Contract End Date:
Address:	Telephone:
	E-Mail Address:
Systems and Services Provided:	

Client Name:	Contract Begin Date:
Contact Name:	Contract End Date:
Address:	Telephone:
	E-Mail Address:
Systems and Services Provided:	

| **Company Name** | **Authorized Signature** | **Date** |

FORM 5

CONTRACT SIGNATURE PAGE
Constituent Relationship Management (311) System
RFP No. 19-0009

THE UNDERSIGNED HEREBY DECLARES THAT HE HAS/THEY HAVE CAREFULLY EXAMINED THE SPECIFICATIONS HEREIN REFERRED TO AND WILL PROVIDE ALL EQUIPMENT, TERMS AND SERVICES TO THE CONSOLIDATED GOVERNMENT OF COLUMBUS, GEORGIA.

By:_____

Witness as to the signing of the contract

Signature of Authorized Representative   Date

_____

Witness as to the signing of the contract

Print Name and Title of Signatory

(Corporate seal, if applicable)

_____

Company Name

Company Ordering Address

Company Payment Address

Contact:_____

Contact:_____

Contact Email_____

Contact Email_____

Telephone_____Fax_____

Telephone:_____Fax_____

CONSOLIDATED GOVERNMENT OF COLUMBUS, GEORGIA

Accepted this___ day of _____20___

APPROVED AS TO LEGAL FORM:

Isaiah Hugley, City Manager

Clifton C. Fay, City Attorney

ATTEST:

Lindsey Glisson, Deputy Clerk of Council