



City of Southlake

REQUEST FOR PROPOSALS

Proposal Reference Number: RFP1905B180DC190014

Project Title: Economic Development – Database Replacement Software

Proposal Closing Date: 3:00 P.M.(CST), Friday, September 13, 2019

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Southlake, Texas

Request for Proposals

1. Introduction

- A. Project Overview: The City of Southlake is requesting Proposals with the intent of awarding a contract for the purchase of goods and services contained in Appendix A – Scope of Services.
- B. Questions: Following are contacts for questions as identified.
- i. RFP Clarifications: All questions related to requirements or processes of this RFP should be submitted in writing to the Purchasing Manager identified in section 2 below.
 - ii. Scope of Service Questions: All questions related to the scope of services should be submitted in writing to the contact person(s) noted in Appendix A – Scope of Services.
 - iii. Replies: Responses to inquiries which directly affect an interpretation or effect a change to this RFP will be issued in writing by addendum posted to City website. All such addenda issued by City prior to the submittal deadline shall be considered part of the RFP. The City shall not be bound by any reply to an inquiry unless such reply is made by such formal written addendum.
 - iv. Acknowledgement of Addenda: The Proposer must acknowledge all addenda by signing and returning such document(s) or by initialing appropriate area of the Proposal.
- C. Notification of Errors or Omissions: Proposers shall promptly notify the City of any omissions, ambiguity, inconsistency or error that they may discover upon examination of this RFP. The City shall not be responsible or liable for any errors and/or misrepresentation that result from the solicitations which are inadvertently incomplete, ambiguous, inconsistent or obviously erroneous.
- D. Conflict of Interest Questionnaire (Form CIQ): A person or business, and their agents, who seek to contract or enter into an agreement with the City, are required by Texas Local Government Code, Chapter 176, to file a conflict of interest questionnaire (FORM CIQ) which is found in Appendix C. The form must be filed with the City Secretary no later than seven (7) days after the date the person or business begins contract discussions or negotiations with the City, or submits an application, response to a request for proposals or bids, correspondence, or other writing related to any potential agreement with the City.
- E. Form 1295 Certificate of Interested Parties: In 2015, the Texas Legislature adopted House Bill 1295, which added section 2252.908 of the Government Code. The law states that a governmental entity or state agency may not enter into certain contracts with a business entity unless the business entity submits a disclosure of interested parties to the governmental entity or state agency at the time the business entity submits the signed contract to the governmental entity or state agency. The law applies only to a contract of a governmental entity or state agency that either (1) requires an action or vote by the governing body of the entity or agency before the contract may be signed or (2) has a value of at least \$1 million. The disclosure requirement applies to a contract entered into on or after January 1, 2016. Please go to the Texas Ethics Commission webpage (www.ethics.state.tx.us) for full instructions and to complete the required steps for creation of Form 1295. Once the form is completed online, printed and signed please return the form with your proposal submission.

2. Definitions

Proposal: The signed and executed submittal of the entirety of Appendix B – Proposal.

Proposer: The Proposer and the Proposer’s designated contact signing the first page of the Proposal.

City of Southlake (“City”): The City of Southlake, Texas.

City Secretary’s Office: The office of the City Secretary of the City, located at 1400 Main Street, Suite #270, Southlake, Texas 76092. PH: (817) 748-8016; Fax: (817) 748-8270.

Project: The name of this Request for Proposals as identified on the cover sheet and first page of Appendix A – Scope of Services.

Purchasing Manager: The City of Southlake Purchasing Manager is Timothy Slifka CPPO, CPPB, Phone: (817) 748-8312, E-Mail: tslifka@ci.southlake.tx.us; Fax (817) 748-8048.

Request for Proposals (RFP): The entirety of this document, including all Appendices and Addenda.

Scope of Services: The entirety of Appendix A – Scope of Services.

3. General Information

A. Tax Exempt Status: City purchases are exempt from State Sales Tax and Federal Excise Tax. Do not include tax in the Proposal. City will furnish Excise Tax Exemption Certificate upon request.

B. Public Inspection of Proposals: The City strictly adheres to the Texas Public Information Act (Texas Government Code Chapter 552.001, et seq.) and all other governing statutes, regulations, and laws regarding the disclosure of RFP information. Proposals are not available for public inspection until after the contract award. If the Proposer has notified the City, in writing, that the Proposal contains trade secrets or confidential information, the City will generally take reasonable steps to prevent disclosure of such information, in accordance with the Public Information Act. This is a statement of general policy only, and in no event shall the City be liable for disclosure of such information by the City in response to a request, regardless of the City’s failure to take any such reasonable steps, even if the City is negligent in failing to do so.

4. RFP Withdrawals and/or Amendments

A. RFP Withdrawal: The City reserves the right to withdraw this RFP for any reason.

B. RFP Amendments: The City reserves the right to amend any aspect of this RFP by formal written Addendum prior to the Proposal submittal deadline and will endeavor to notify all potential Proposers that have registered with the City, but failure to notify shall impose no obligation or liability on the City.

5. Proposal Submittal Requirements

A. Submittal Packet – Required Content: All proposals must be submitted electronically. The Proposer must visit www.securebidusa.com and register. Once registered for this complimentary service, the Proposer may submit Proposal Documents electronically by selecting the appropriate Proposal Identification.

B. Submittal Deadline: The deadline for submittal of Proposals shall be as identified on page 13 (thirteen) of Appendix B-Proposal. It is the Proposer’s responsibility to have the Proposal

Documents correctly electronically submitted by the submittal deadline. No extensions will be granted and no late submissions will be accepted.

- C. Proposals Received Late: Proposers are encouraged to submit their proposals as soon as possible. The time and date of receipt as recorded within the SecureBid electronic system shall be the official time of receipt. The City is not responsible for late submission regardless of the reason. Late Proposals will not be considered under any circumstances.
- D. Alterations or Withdrawals of Proposal Document: Any submitted Proposal may be withdrawn or a revised proposal substituted prior to the submittal deadline. Proposal Documents cannot be altered, amended or withdrawn by the Proposer after the submittal deadline, unless such alteration, amendment or withdrawal notice is approved in writing by the Purchasing Manager.
- E. Proposal Document Format: All Proposal Documents must be prepared in single-space type, on standard 8-1/2" x 11" vertically oriented pages, numbered at the bottom. The City only accepts electronic submissions via www.securebidusa.com. Any other format (via telephone, fax, email, etc.) may be rejected by the City at its discretion.
- F. Validity Period: Once the submittal deadline has passed, any Proposal Document shall constitute an irrevocable bid to provide the commodities and/or services set forth in the Scope of Services at the price(s) shown in the Proposal Document. Such proposal shall be irrevocable until the earlier of the expiration of ninety (90) days from the submittal deadline, or until a contract has been awarded by the City.

6. **Proposal Evaluation and Contract Award**

- A. Proposal Evaluation and Contract Award Process: An award of a contract to provide the goods or services specified herein will be made using competitive sealed proposals, in accordance with Chapter 252 of the Texas Local Government Code and with the City's purchasing policy. The City will evaluate all proposals to determine which proposers are reasonably qualified for the award of the contract, applying the anticipated evaluation factors and emphasis to be placed on each factor as identified in the Scope of Services. The City may, at its option, conduct discussions with or accept proposal revisions from any reasonably qualified proposer. The City reserves the right to determine which proposal will be most advantageous to the City.
- B. Completeness: If the Proposal is incomplete or otherwise fails to conform to the requirements of the RFP, City alone will determine whether the variance is so significant as to render the Proposal non-responsive, or whether the variance may be cured by the Proposer or waived by the City, such that the Proposal may be considered for award.
- C. Ambiguity: Any ambiguity in the Proposal as a result of omission, error, lack of clarity or non-compliance by the Proposer with specifications, instructions and all conditions shall be construed in the favor of the City. In the event of a conflict between these standard RFP requirements and details provided in Appendix A – Scope of Services or Appendix B – Proposal, the Appendices shall prevail.
- D. Unit Prices and Extensions: If unit prices and their extensions do not coincide, the City may accept the price most beneficial to the City, and the Proposer will be bound thereby.
- E. Additional Information: City may request any other information necessary to determine Proposer's ability to meet the minimum standards required by this RFP.
- F. Partial Contract Award: City reserves the right to award one contract for some or all the requirements proposed or award multiple contracts for various portions of the requirements to different Proposers

based on the unit prices proposed in response to this request, or to reject any and all Proposals and re-solicit for Proposals, as deemed to be in the best interest of City.

G. Terminate for Cause: The occurrence of any one or more of the following events will justify termination of the contract by the City of Southlake for cause:

- i) The successful proposer fails to perform in accordance with the provisions of these specifications; or
- ii) The successful proposer violates any of the provisions of these specifications; or
- iii) The successful proposer disregards laws or regulations of any public body having jurisdiction; or
- iv) The successful proposer transfers, assigns, or conveys any or all of its obligations or duties under the contract to another without written consent of the City.
- v) If one or more of the events identified in Subparagraphs G i) through iv) occurs, the City of Southlake may, terminate the contract by giving the successful proposer seven (7) days written notice. In such case, the successful proposer shall only be entitled to receive payment for goods and services provided before the effective date of termination. The successful proposer shall not receive any payment on account of loss of anticipated profits or revenue or other economic loss resulting from such termination.
- vi) When the contract has been so terminated by the City of Southlake, such termination shall not affect any rights or remedies of the City then existing or which may thereafter accrue.

H. Terminate for Convenience: This contract may be cancelled or terminated at any time by giving vendor thirty (30) days written notice. Vendor may be entitled to payment for services actually performed; to the extent said services are satisfactory.

Appendix A – Scope of Services

1. **Project Title:** Economic Development – Database Replacement Software

2. **Scope of Services Contact**

Questions about the technical nature of the Scope of Services, etc. may be directed to **TIM SLIFKA**,
Phone. 817.748.8312, e-mail: tslifka@ci.southlake.tx.us.

3. **Special Conditions**

The following special conditions shall prevail over areas of conflict in previous pages:

NONE

4. **Proposal Evaluation Factors**

Emphasis	Factor
20%	Project Understanding and Approach
15%	Company experience performing similar work
10%	Key staff or Company personnel experience
15%	Responsiveness to the RFP
25%	Ability to inherently meet the technical and functional requirements
15%	Overall cost for services

5. **Brand Manufacture Reference**

The City has determined that any manufacturer’s brand defined in the Scope of Services meets the City’s product and support need. The manufacturer’s reference is not intended to be restrictive, and is only descriptive of the type and quality the City desires to purchase. Quotes for similar manufactured products of like quality will be considered if the Proposal is fully noted with the manufacturer’s brand name and model. The City reserves the right to determine products and support of equal value, and whether other brands or models meet the City’s product and support needs.

6. **Key Events Schedule**

Proposal Release Date	August 12, 2019
Deadline for Submittal of Written Questions	August 29, 2019
Sealed Proposals Due to and Opened by City	Shown on First Page of this RFP
Anticipated Committee Evaluation Review Date	Week of September 16, 2019
Anticipated Award Date	October 2019

7. **Scope of Services**

The City of Southlake, Texas, is requesting proposals to identify a professional economic development software service provider that is qualified to plan, execute, and deliver a new economic development database software replacement, as well as provide ongoing hosting and maintenance of the software.

This Request for Proposals (RFP) outlines the needs of the City and the requirements for submitting a proposal to perform the service.

- A. Purpose: The City of Southlake is seeking a highly qualified software firm to plan, execute, and deliver an economic development database software replacement, as well as provide ongoing hosting and maintenance of the software.

The consultant must have demonstrated experience in relevant project management and expertise with the best practices (including development and deployment). Qualified consultants will have successfully demonstrated relevant experience in working with economic development organizations. Consultants should be familiar with the City of Southlake's assets regarding economic development and offer management suggestions.

- B. Southlake Values: The selected firm will be expected to conduct business in a manner consistent with the City's organizational values which are represented in the City of Southlake's Strategy Map on Exhibit A.
- C. Project Manager: The Project Manager for the Project shall be Chief Strategic Performance Officer, Dale Dean.
- D. Budget: The City anticipates a total cost not to exceed \$25,000 for the Project. All proposed services should be based on a realistic ability to deliver these services within budget. The City is also soliciting input on hosting and ongoing maintenance and will entertain cost proposals with this solicitation to provide these services after initial implementation. A full detail of subscription costs from year-to-year (e.g. cost per user, annual software support costs, percent increase from year-to-year) will be necessary in order for the City to evaluate long-term budgeting needs.
- E. Implementation: The City anticipates an October – December 2019 implementation schedule (FY 2020 Quarter 1).

Background Information:

The following is a snapshot summary of information about the City. Additional information can be found on the City's website at www.CityofSouthlake.com.

- A. Population: The current estimated population for the City is 30,584. (Source: City of Southlake Planning and Development Services Department)
- B. Geography: The City is approximately 22 square miles in size. The City is immediately west of Grapevine, approximately 10 minutes from DFW International Airport.
- C. Build-out: The city is expected to have a 34,188 build-out population with 10,617 residential units. (Source: City of Southlake Planning and Development Services Department)
- D. Community Profile: Over the past 30 years, the City of Southlake has grown and become a premier community in the Dallas-Fort Worth metropolitan area. The City's dedication to quality development, sound fiscal policies, and effective strategic management has made it an exemplary community. It has consistently been ranked as one of the best places to live by D Magazine and Fort Worth Magazine, and the Dallas Morning News has reported Southlake as one of the Best Neighborhoods in DFW, with an overall rating of five stars. The City plans for and prioritizes economic sustainability in order to continue to provide the highest level of service to residents, businesses and visitors, and promote quality of life for Southlake's residents now and in the future.
- E. Project Background: The City of Southlake wishes to maintain a strong and healthy economy and has dedicated time and resources to economic development which is identified as a vital city function in order to maintain the strong and healthy economy. As such, the mission of the Department of Economic Development and Tourism (EDT) is to sustain and grow Southlake's vibrant

economy and outstanding quality of life by providing leadership and resources to attract, enhance and retain businesses and visitors. Services include:

- Business Retention:
 - Creating a strong network of relationships with existing businesses through a robust business engagement program
 - Providing marketing support to new and existing businesses
- Business Attraction:
 - Site selection assistance
 - Familiarization tours and community visits
 - Facilitating requests for public funds investments via incentives
 - Managing programs to market the City and attract desired businesses by thoroughly communicating Southlake's advantageous market and economic position
- Data Management
 - Demographic and market research
 - Maintain and develop an inventory of available buildings and sites
 - Public investment & tracking
 - Business and business contact inventory

The Southlake 2035 Economic Development Master Plan, adopted in October 2016, outlines the City's approach and goals related to economic development, including the identification of target industries and a recommendation to improve communication tools, including website presence (specific recommendation language below). The plan is available for review online at www.Southlake2035.com

Recommendation ED 1:

- Implement a database replacement/economic development software tool to ensure development and maintenance of relationships with regional developers, brokers, site selectors and state and regional organizations.

Overview: The goal of this new software is to integrate multiple databases/data sets into one software that eliminates redundancy in our current data input processes while facilitating the ability for the City to have the most current up-to-date information pertaining to businesses, contacts, prospects and incentives while allowing the City to analyze information within the software to make informed business decisions. The new software will become the primary source for City Economic Development staff and others to manage contacts, businesses, leads and economic development projects.

Currently, the City's economic development contacts and business list is contained in two Microsoft Access databases. The business database currently interfaces with the City of Southlake's website (an option we need to continue having) via www.SouthlakeBusinesses.com, and the business contacts database that houses all the City's business related contacts (see the "Present Day Data Management Process" section below for more information). While these databases have served the City, they have led to duplication of work and proven to be inefficient with the City's current needs.

The City would like to avoid constraining those intending to respond to this Request for Proposals by allowing responders to interpret the needs of a City of Southlake and suggesting best practices/functionality to incorporate into the software. We expect those responding to this RFP to address the economic development software needs outlined in this RFP and propose features and components accordingly that best fulfill our goals.

The following sections are included to illustrate the City's minimum expectations for a software; they are NOT meant to be constraints on responder's proposed software.

Software Components: The end-user experience should be one that delivers easy-to-use, updated information that is consistent across the different components being sought after in the software. It should position city staff to be able to access and input information into the software without needing to update data across the different components. It is crucial that the navigation be as intuitive as possible to reduce staff training.

The software should:

- Have an intuitive easy-to-use user interface;
- At a minimum, include the four elements shown in the Software Requirements List;
- Meet the needs specified in the requirements list or have a solution/function for the requirement;
- Eliminate redundancy of inputting information across multiple components;
- Have the ability to generate reporting based on user search criteria;
- Address the needs stated in the requirements lists;
- Be able to be interfaced with existing City websites for business (external user) self-serve;
- Provide relevant analytics based on data input in the software; and,
- Reduce the time staff takes to update/input information into the software.

Expected Basic Functionality:

- **Keyword Search:** Being able to search for specific attributes and keywords is essential for staff looking to. In addition, being able to determine from which element to search in or filter results from.
- **Website Interface:** Interface with the City’s website (www.SouthlakeBusinesses.com) for our business database is necessary. The City should be able to select what information is made public through this interface from the new database. The City is currently in the process of developing a new website through WordPress. An interface will be necessary for outside users to search our database for businesses located in Southlake based on name, category, amenity, etc...
- **Accessibility, Compatibility and Mobile-Friendly Design:** The software must meet accessibility requirements and must be designed to function effectively on mobile displays as well as be compatible with current versions of commonly used internet browsers.
- **Google Analytics Integration:** It is important that the City have the ability to track key metrics for website usage and prefers integrating google analytics into the development of the software. This of course is only being sought for any “public” portions of the software.
- **Communication:** The ability to survey and send mass communication is an important functionality for the software. To this end, being able to send graphics or manipulate the survey and mass communication is highly desirable.

Present Day Data Management Process: The City of Southlake’s currently manages two Microsoft Access databases (the Business Database and the Contacts Database) and a Smartsheet (software as a service (SaaS) application) that contains our development “Prospects” looking to relocate or expand in Southlake.

- The Business Database contains all former, current and known coming businesses in Southlake. A variety of information is entered in to each business entry, as noted below, that is obtained from Certificate of Occupancy information and general internet searches. Maintaining this information on a consistent basis is challenging for the Economic Development & Tourism office due to limited staff, hence the need for a software with the ability to manage data effectively for City staff. Below is a listing of existing information the City inputs to each Business entry (See Exhibit B for existing setup):

- Business Name, Phone, Fax, Website, Address
 - Primary Contact Name, Number, Email
 - Opened/Closed Dates
 - Date of last information update
 - Type of business (as it pertains to NAICS classification and our own Shopping & Dining Guide - <https://www.cityofsouthlake.com/2532/Interactive-Shopping-and-Dining-Maps>)
 - Date of last visit
 - Square feet of business space
 - Shopping Center location
 - Pet Friendly business
 - Available Amenities (as shown, but not limited to the categories listed in Exhibit 'B')
- The Contacts Database contains all contacts that Economic Development & Tourism staff interact with, conduct business with, or are key business representatives within the community. This database is also a challenge to maintain due to limited capacity. A listing of relevant information for each contact is listed below. Below is a listing of information input into our Contacts Database (See Exhibit C for existing setup).
 - Name
 - Organization/Business
 - Contact Information (including E-mail)
 - Email subscriptions
 - Position/Role in Organization/Business
 - Purpose/Affiliation with the City
- The Prospect Smartsheet contains the name of Prospect projects along with relevant information such as main point of contact, specifics of request and a timeline of interactions. This element of the software should have a clear workflow with the ability for staff to search and update as needed.
- The Incentives (Public Investment & Tracking) portion of the software request is not currently something the City monitors on a digital platform. The City currently monitors project performance manually and through reminders on calendars. It will be critical for the selected software vendor to understand incentive tracking and progress and implement a way to monitor this type of business function.

Software Requirements List: The following is a listing of requirements based on each element required in the needed database replacement software. These element requirements should be addressed in some form within the RFP.

- Contacts Database Element
 - Contacts Database with user interface
 - Contacts database “linked” or with an ability to communicate with the Business database so both databases do not have to be updated with specific contact information
 - Categorization of contacts (e.g. broker, store manager/owner, developer, etc.)
 - Ability to add communication (e.g. emails) with contacts notes/information and show history of communication (chronologically)
 - Ability to export entire contacts database into spreadsheets
 - Ability to send mass communications like email based on specific contact category
 - Ability to survey based on contact category
 - Ability to upload documents/attachments to contact(s) or group of contacts
 - Ability to set auto email/calendar reminders pertaining to specific or group of contacts
 - Ability for staff to add/remove contact categories without vendor assistance

- Ability to send emails based upon variety of filters (categories) created by staff
- Ability to create events and for business/contacts to register/rsvp for it (similar to Eventbrite)
- Business Database Element
 - Business Database with user interface
 - Ability to show current versus former business
 - Business database connected to contacts database so one or multiple contacts can be added/removed from a specific business
 - Ability for staff to add/remove informational categories such as “number of employees,” “Southlake Chamber of Commerce member” or “Pet-friendly”
 - NAICS categorization for each business
 - City categorization customization (e.g. shopping, dining, office, industrial, etc.) including subcategories (e.g. Dining: BBQ, Seafood, Steakhouse, etc.)
 - Ability for this database to be added/integrated to city/economic development website (WordPress). (Staff must be able to customize information to be displayed to public) Should also be mobile friendly
 - Ability for software to auto-update contact information by sending email to business for review and update on a consistent frequency (e.g. annually)
 - Ability for businesses to add their own information to our database through public interface
 - Ability for anyone to sign-up for new business additions to database or “coming soon” businesses.
 - Ability for software to generate a story map based on business types (e.g. shopping & dining guide)
 - Ability to upload attachments/documents/images to business
 - Ability to add image to business and it show up on story map
 - Ability to send mass communications like emails/surveys based on specific business category
 - Ability to survey businesses (similar to Google Forms capability)
 - Ability to track/assign tasks, such as phone calls, site visits, emails, etc. to yourself or specific staff members
 - Ability to export all database information into spreadsheet
 - Ability to send generate auto-messaging when set for businesses -such as business anniversary
 - Ability for software to generate infographic information – such as number of businesses in specific categories or number of years in business
 - Ability for business to opt-in/out of mass communications (with the exception that staff is able to override and still send email like with a survey)
 - Business contact information should remain separate from individual contacts information placed in database
 - Ability to customize email templates (e.g. Constant Contact)
 - System website and emails are compatible with mobile devices and display
 - Ability to pre-schedule emails (not auto-generate) for a future date based upon variety of filters/categories
 - Notifications sent to designated staff (at staff’s discretion and ability to modify) when businesses are added to database by other staff or by business themselves
 - Ability to create events and for business/contacts to register/rsvp for it (similar to Eventbrite)
 - Ability for the software to perform analytics of the different business information input into database – in addition to outside business input from web portal
- Prospects – Development Element
 - Prospect database with user interface
 - Ability for staff to create “prospect cases”
 - Ability to upload documents/attachments to “prospect case”
 - Ability to add communications (e.g. meetings, emails, etc.) to create a chronological history of interactions
 - Ability to input prospect requirements (e.g. type of site, square footage, number of employees, average salary, etc.) into fields

- Ability to generate reports of prospect submittals quarterly or annually
- Ability to set reminders for staff to determine if prospects are still active
- Ability to add Contacts from “Contacts Module” and have contacts database updated based on “prospect case” created
- Incentives – Projects Element
 - Incentive database with user interface
 - Ability to create “incentive project”
 - Ability to add contacts from “Contacts Module” with notation added to contact that they are primary or a contact for a specific incentive project
 - Ability to provide a incentive application status (e.g. applied, MOU, approved by Council, final/agreement executed, etc.)
 - Ability to input financial information (e.g. ROI, Indirect & Induced, Economic Benefits, Tax Revenues, Government Costs, Incentive Options, Economic Development Agreements, Tax Abatement /Exemptions/Rebates, Tax Increment Financing, etc.)
 - Ability to add project specific information and generate report
 - Ability to add documents/attachments to “incentive project case”
 - Ability for performance measures to be created
 - Ability for performance measures to be monitored through email/calendar reminders to specific staff members (as determined by staff) to verify if measures have been met
 - Ability to input information from “Incentives Application” (Attachment A)
 - Ability to input information from “Project Data Sheet” (Attachment B)
 - Businesses “tied” to GIS mapping software (for internal use)
 - Ability for the software to perform analytics of incentive project information and ability for projects to meet goals. This should be partnered with infographic type information

Appendix B – Proposal

Submittal Checklist: (To help determine validity of proposal)

_____ Appendix B (pages 13 through 20) must be included in the proposal submittal

_____ Appendix C Conflict of Interest Form (page 20) must be included in the proposal submittal.

_____ Form 1295 Certificate of Interested Party must be included in the proposal submittal. See page 2.

_____ HB 89 and SB 252 Certification (Page 18) as required

All proposals submitted to the City of Southlake shall include this page with the submitted Proposal.	
RFP Number:	RFP1905B180DC190014
Project Title:	Economic Development – Database Replacement Software
Submittal Deadline:	3:00 P.M. (CST), Friday September 13, 2019
Submit electronically* to: www.securebidusa.com * Requires email account login and password.	
<u>Proposer Information:</u>	
Proposer’s Legal Name:	
Address:	
City, State & Zip	
Federal Employers Identification Number #	
Phone Number:	Fax Number:
E-Mail Address:	
<u>Proposer Authorization</u>	
<p>I, the undersigned, have the authority to execute this Proposal in its entirety as submitted and enter into a contract on behalf of the Proposer.</p> <p>Printed Name and Position of Authorized Representative: _____</p> <p>Signature of Authorized Representative: _____</p> <p>Signed this _____ (day) of _____ (month), _____ (year)</p>	

I learned of this Request for Proposals by the following means:

- | | |
|--|---|
| <input type="checkbox"/> Newspaper Advertisement | <input type="checkbox"/> City E-mail Notification |
| <input type="checkbox"/> Southlake Website | <input type="checkbox"/> Cold Call to City |
| <input type="checkbox"/> Mailed Me a Copy | <input type="checkbox"/> Other |
| <input type="checkbox"/> SecureBid | |

Appendix B – Proposal (continued)

I. REQUIRED PROPOSAL INFORMATION. IN ORDER FOR A PROPOSAL TO BE CONSIDERED COMPLETE, AND TO BE EVALUATED FOR A CONTRACT AWARD BY THE CITY, PROPOSER MUST SUBMIT ALL OF THE FOLLOWING INFORMATION:

Overview of Work:

The City of Southlake seeks a reliable software service provider with a proven track record for excellence in software solutions for economic development agencies in development, execution, hosting and maintenance.

- Provide, develop and host software for key economic development data, repository and analysis.
- Thorough testing of software with City staff.
- Training on backend/platform use for staff and built in hours for consulting for the first 3 months following launch.
- Develop and implement a data integration strategy plan of existing data sources the City currently uses to populate the software and effectively “clean-up” out of date information.
- Develop and implement hosting and maintenance strategy plan.
- Provide specific responses addressing the software requirements for the four elements of the software being requested.

1) Proposal Content:

The City of Southlake requests that the proposer submit a concise proposal clearly addressing all the requirements outlined in this RFP. Proposals shall include the following:

- a) Company Profile: A brief profile of the company (limit to 4 pages), including number of years in the Software business and number of years in the overall software business. Include language that reflects experience with economic development and its best practices and processes.
- b) Organization chart, senior management profiles, and management profiles of all staff assigned to the project.
- c) Resumes: A list of key personnel to be involved in the work for this project (limit to 8 pages).
 - Removal or Replacement of Staff: If an assigned staff person must be removed or replaced for any reason, the replacement person must be approved by City prior to joining the project.
- d) Financial Statements: Provide financial statements for the last two fiscal years. If the company is publicly traded, please include this data from the company’s annual report and related SEC filings. If a company is privately held, please provide, at a minimum, annual revenues for the previous two fiscal years. Please indicate if the data is audited by an external CPA company. The financial data presented should demonstrate that the company is not at substantial risk of failing to deliver what they intend to deliver over the short, mid, and/or long-term due to their financial situation.
- e) Illustrative Work: A list and description of recent similar work performed for other municipalities or agencies that most closely represent the type of software installation or services being proposed herein and that are similar in size, scope, and complexity to the City of Southlake. References should include a current contact name and phone number for the municipality or agency (limit to 8 pages).
- f) Project Understanding and Approach: (limit to 20 pages)
 - A concise statement illustrating your understanding of the services required to successfully deliver this project.
 - Does your company demonstrate the ability to meet the entire scope of work being proposed.
 - Provide detailed responses to the RFP Requirements List, including scope of services, implementation and training services, and test and production environments.

- Provide a summary of your company’s project approach and explain why the City of Southlake would benefit from selecting your company to do this work.
- g) **Additional Information or Resources:** (limit to 6 pages)
- An estimate of the total time needed for your company to complete the work (see § 1.i below).
 - Other information you believe is relevant.
 - Provide responses to the Requested Functional and Technical Components
- h) **Guarantees and Warranties:** Each Proposer shall submit a complete copy of any warranties or guarantees provided by the developer or Proposer with the Proposal submitted.
- i) **Project Schedule/Delivery Date:** Proposer must provide a project schedule noting all projected completion dates for segments of the Project, from start-up to completion, and all delivery dates for goods covered by the RFP. The Proposal must show the number of days required to deliver and install the product or equipment after the receipt of the City’s Purchase Order.

2) Cost of Proposed Products and/or Services

- a) **Pricing:** Pricing shall reflect the full Scope of Services defined herein, inclusive of all associated cost for delivery, labor, insurance, taxes, overhead, and profit.
- b) **Schedule of Pricing:** All proposed design services should be based on a realistic ability to deliver these services within budget (less than or equal to \$25,000). The City is also soliciting input on hosting and ongoing maintenance and will entertain cost proposals with this solicitation to provide these services after design is complete. A full detail of subscription costs from year-to-year (e.g. cost per user, annual software support costs, percent increase from year-to-year) will be necessary in order for the City to evaluate long-term budgeting needs.
- c) **Software Hosting and Maintenance:** The City anticipates performing the clear majority of content management but will need cost proposals to provide hosting and ongoing maintenance. The typical contract would be for two (2) years with three (3) one (1) year options to renew.

3) RFP Evaluation:

The proposals will be evaluated by an Evaluation Committee composed usually of City of Southlake personnel. Members of the Evaluation Committee will independently review and rate each proposal based on the listed criteria. The following criteria will be used to evaluate the Proposals and to select a short list of proposers to provide a demonstration of their software functionality:

- Project understanding/approach: Does the project approach demonstrate an understanding of the Scope of Services required by this project? Does the proposal demonstrate the company’s ability to complete the project within the project schedule? Does the proposal provide a schedule showing milestones for completion of major tasks?
- Company experience performing similar work: Is the company experienced in providing services similar to that requested in the RFP? Does the proposal provide references for projects listed? Does the proposal address the company’s involvement/responsibilities for each project listed?
- Qualifications of key personnel: Does the proposal provide the personnel with the experience, background, and skills required by this project? Does the proposal include the specific key personnel that will be assigned to City of Southlake project? Does the proposal adequately describe the specific project involvement of those persons noted in the proposal?
- Responsiveness to the RFP: Does the proposal address all requested information required by RFP?
- Ability to inherently meet the technical and functional requirements specified in the RFP (Database Replacement Software Requirements)

- Overall cost of all services stated within this RFP.

4) Trade Secrets and/or Confidential Information

Trade Secrets and/or Confidential Information: This proposal ___ (does) ___ (does not) contain trade secrets and/or confidential information. If applicable, describe such trade secrets and confidential information, and the basis for your assertion that such material qualifies for legal protection from disclosure.

5) Federal, State and/or Local Identification Information

- A. Centralized Master Bidders List registration number: _____.
- B. Prime contractor HUB / MWBE registration number: _____.
- C. An individual Proposer acting as a sole proprietor must also enter the Proposer’s Social Security Number: # _____ - _____ - _____.

6) Emergency Business Services Contact Notice

During a natural disaster, or homeland security event, there may be a need for the City of Southlake to access your business for products or services after normal business hours and/or holidays. The City may request City employee pick up or vendor delivery of product or services.

For this purpose, a primary and secondary emergency contact name and phone number are required. It is critical the vendor’s emergency contact information remains current. City shall be contacted by E-mail with any change to a contact name or phone number of these emergency contacts. Updates may be emailed to vendors@ci.southlake.tx.us.

All products or services requested during an emergency event are to be supplied as per the established contract prices, terms and conditions. The vendor shall provide the fee (pricing) for an after-hours emergency opening of the business, if any. In general, orders will be placed using a City of Southlake procurement card (Master Card) or City issued Purchase Order. The billing is to include the emergency opening fee, if applicable.

The contractor shall provide the names, phone numbers and fee (pricing), if any, for an after-hours emergency opening of the business listed below.

Business Name: _____

Contract #: _____

Description: _____

Primary Contact (Name): _____

Primary Contact Phone Numbers: Home: _____ Cell: _____

Secondary Contact (Name): _____

Secondary Contact Phone Numbers: Home: _____ Cell: _____

After Hours emergency opening fee, if applicable: \$ _____

7) Cooperative Governmental Purchasing Notice

Other governmental entities maintaining interlocal agreements with the City, may desire, but are not obligated, to purchase goods and services defined in this RFP from the successful Bidder. All purchases by governmental entities, other than the City, will be billed directly to and paid by that governmental entity. The City will not be responsible for another governmental entity's debts. Each governmental entity will place their own orders with the successful Bidder and be responsible for ensuring full compliance with the RFP specifications. Prior to other governmental entities placing orders, the City will notify the successful Bidder of their intent.

Please indicate below if you will permit other governmental entities to purchase from your agreement with the City.

Yes, Others can purchase **No, Only the City can purchase**

II. CONTRACT TERMS AND CONDITIONS. EXCEPT WHERE PROPOSER MAKES SPECIFIC EXCEPTION IN THE SUBMITTED PROPOSAL, ANY CONTRACT RESULTING FROM THIS RFP WILL CONTAIN THE FOLLOWING TERMS AND CONDITIONS, WHICH PROPOSER HEREBY ACKNOWLEDGES, AND TO WHICH PROPOSER AGREES BY SUBMITTING A PROPOSAL:

1. Delivery of Products and/or Services

- A. Payment Terms: Unless otherwise specified in the Scope of Services or otherwise agreed to in writing by the City, payment terms for the City are Net 30 days upon receipt of invoice.
- B. Warranty of Products and Services: All products furnished under this contract shall be warranted to be merchantable and good quality and fit for the purposes intended as described in this Proposal, to the satisfaction of City and in accordance with the specifications, terms, and conditions of the Scope of Services, and all services performed shall be warranted to be of a good and workmanlike quality, in addition to, and not in lieu of, any other express written warranties provided.
- C. Late Delivery or Performance: If Proposer fails to deliver acceptable goods or services within the timeframes established in the Project Schedule, the City shall be authorized to purchase the goods or services from another source and assess any increase in costs to the defaulting Proposer, who agrees to pay such costs within ten days of invoice.
- D. Title to Goods and Risk of Loss: For goods to be provided by Proposers hereunder, if any, the title and risk of loss of the goods shall not pass to City until City actually receives, takes possession, and accepts the goods and the installation of such goods, has tested the system, and determined that it is in good and acceptable working order.

2. Miscellaneous

- A. Independent Contractor: Proposer agrees that Proposer and Proposer's employees and agents have no employer-employee relationship with City. Proposer agrees that if Proposer is selected and awarded a contract, City shall not be responsible for the Federal Insurance Contribution Act (FICA) payments, Federal or State unemployment taxes, income tax withholding, Workers Compensation Insurance payments, or any other insurance payments, nor will City furnish any medical or retirement benefits or any paid vacation or sick leave.
- B. Assignments: The rights and duties awarded the successful Proposer shall not be assigned to another without the written consent of the Purchasing Manager. Such consent shall not relieve the assigner of liability in the event of default by the assignee.
- C. Liens: Proposer shall indemnify and save harmless the City against any and all liens and encumbrances for all labor, goods, and services which may be provided to the City by Proposer or

Proposer's vendor(s), and if the City requests, a proper release of all liens or satisfactory evidence of freedom from liens shall be delivered to the City.

- D. Gratuities / Bribes: Proposer certifies that no bribes in the form of entertainment, gifts, or otherwise, were offered or given by the successful Proposer, or its agent or representative, to any City officer, employee or elected representative, with respect to this RFP or any contract with the City, and that if any such bribe is found to have been made this shall be grounds for voiding of the contract.
- E. Financial Participation: Proposer certifies that it has not received compensation from the City to participate in preparing the specifications or RFP on which the Proposal is based and acknowledges that this contract may be terminated and/or payment withheld if this certification is inaccurate.
- F. Required Licenses: Proposer certifies that he holds all licenses required by the State of Texas for a provider of the goods and/or services described by the Scope of Services herein.
- G. Authority to Submit Proposal and Enter Contract: The person signing on behalf of Proposer certifies that the signer has authority to submit the Proposal on behalf of the Proposer and to bind the Proposer to any resulting contract.
- H. Compliance with Applicable Law: Proposer agrees that the contract will be subject to, and Proposer will strictly comply with, all applicable federal, state, and local laws, ordinances, rules, and regulations.
- I. Compliance with HB 89: Proposer agrees per HB 89 vendor shall not boycott Israel at any time while providing products or services to the City of Southlake.

Yes, we agree **No, we do not agree** **N/A**

- J. Compliance with SB 252: Proposer agrees per SB 252 vendor shall not do business with Iran, Sudan or a foreign terrorist organization while providing products or services to the City of Southlake.

Yes, we agree **No, we do not agree**

3. Financial Responsibility Provisions

- A. Insurance: The Proposer, consistent with its status as an independent contractor, shall carry, and shall require any of its subcontractors to carry, at least the following insurance in such form, with such companies, and in such amounts (unless otherwise specified) as City may require:
 - i. Worker's Compensation and Employer's Liability insurance, including All States Endorsement, to the extent required by federal law and complying with the laws of the State of Texas;
 - ii. Commercial General Liability insurance, including Blanket Contractual Liability, Broad Form Property Damage, Personal Injury, Completed Operations/Products Liability, Premises Liability, Medical Payments, Interest of Employees as additional insureds, and Broad Form General Liability Endorsements, for at least One Million Dollars (\$1,000,000) Combined Single Limit Bodily Injury and Property Damage on an occurrence basis;
 - iii. Comprehensive Automobile Liability insurance covering all owned, non-owned or hired automobiles to be used by the Contractor, with coverage for at least One Million Dollars (\$1,000,000) Combined Single Limit Bodily Injury and Property Damage.
- B. Indemnification: **Proposer agrees to defend, indemnify and hold harmless the City, all of its officers, Council members, agents and employees from and against all claims, actions, suits, demands, proceedings, costs, damages and liabilities, including reasonable attorneys' fees, court costs and related expenses, arising out of, connected with, or resulting from any acts or omissions of Proposer or any agent, employee, subcontractor, or supplier of Proposer in the execution or performance of this contract without regard to whether such persons are under the direction of City agents or employees.**

Appendix C – Form CIQ

INFORMATION REGARDING VENDOR CONFLICT OF INTEREST QUESTIONNAIRE

WHO: The following persons must file a Conflict of Interest Questionnaire with the City if the person has an employment or business relationship with an officer of the City that results in taxable income exceeding \$2,500 during the preceding twelve – month period, or an officer or a member of the officer’s family has accepted gifts with an aggregate value of more than \$250 during the previous twelve – month period and the person engages in any of the following actions:

1. contracts or seeks to contract for the sale or purchase of property, goods or services with the City, including any of the following:
 - a. written and implied contracts, utility purchases, purchase orders, credit card purchases and any purchase of goods and services by the City;
 - b. contracts for the purchase or sale of real property, personal property including an auction of property;
 - c. tax abatement and economic development agreements;
2. submits a bid to sell goods or services, or responds to a request for proposal for services;
3. enters into negotiations with the City for a contract; or
4. applies for a tax abatement and/or economic development incentive that will result in a contract with the City

THE FOLLOWING ARE CONSIDERED OFFICERS OF THE CITY:

1. Mayor and City Council Members;
2. City Manager;
3. Board and Commission members and appointed members by the Mayor and City Council;
4. Directors of 4A and 4B development corporations;
5. The executive directors or managers of 4A and 4B development corporations; and
6. Directors of the City of Southlake who have authority to sign contracts on behalf of the City.

EXCLUSIONS: A questionnaire statement need not be filed if the money paid to a local government official was a political contribution, a gift to a member of the officer’s family from a family member; a contract or purchase of less than \$2,500 or a transaction at a price and subject to terms available to the public; a payment for food, lodging, transportation or entertainment; or a transaction subject to rate or fee regulation by a governmental entity or agency.

WHAT: A person or business that contracts with the City or who seeks to contract with the City must file a “Conflict of Interest Questionnaire” (FORM CIQ) which is available online at www.ethics.state.tx.us and a copy of which is attached to this guideline. The form contains mandatory disclosures regarding “employment or business relationships” with a municipal officer. Officials may be asked to clarify or interpret various portions of the questionnaire.

WHEN: The person or business must file:

1. the questionnaire – no later than seven days after the date the person or business begins contract discussions or negotiations with the municipality, or submits an application, responds to a request for proposals or bids, correspondence, or other writing related to a potential contract or agreement with the City; and
2. an updated questionnaire – within seven days after the date of an event that would make a filed questionnaire incomplete or inaccurate.

It does not matter if the submittal of a bid or proposal results in a contract. The statute requires a vendor to file a FORM CIQ at the time a proposal is submitted or negotiations commence.

WHERE: The vendor or potential vendor must mail or deliver a completed questionnaire to the Finance Department. *The Finance Department is required by law to post the statements on the City’s website.*

ENFORCEMENT: Failure to file a questionnaire is a Class C misdemeanor punishable by a fine not to exceed \$500. It is an exception to prosecution that the person files a FORM CIQ not later than seven business days after the person received notice of a violation.

NOTE: The City does not have a duty to ensure that a person files a Conflict of Interest Questionnaire.

CONFLICT OF INTEREST QUESTIONNAIRE

FORM CIQ

For vendor or other person doing business with local governmental entity

This questionnaire reflects changes made to the law by H.B. 1491, 80th Leg., Regular Session. This questionnaire is being filed in accordance with Chapter 176, Local Government Code by a person who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the person meets requirements under Section 176.006(a).
By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the person becomes aware of facts that require the statement to be filed. See Section 176.006, Local Government Code.
A person commits an offense if the person knowingly violates Section 176.006, Local Government Code. An offense under this section is a Class C misdemeanor.

OFFICE USE ONLY

Date Received

1 Name of person who has a business relationship with local governmental entity.

2 Check this box if you are filing an update to a previously filed questionnaire.

(The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date the originally filed questionnaire becomes incomplete or inaccurate.)

3 Name of local government officer with whom filer has employment or business relationship.

Name of Officer

This section (item 3 including subparts A, B, C & D) must be completed for each officer with whom the filer has an employment or other business relationship as defined by Section 176.001(1-a), Local Government Code. Attach additional pages to this Form CIQ as necessary.

A. Is the local government officer named in this section receiving or likely to receive taxable income, other than investment income, from the filer of the questionnaire?

Yes No

B. Is the filer of the questionnaire receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer named in this section AND the taxable income is not received from the local governmental entity?

Yes No

C. Is the filer of this questionnaire employed by a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership of 10 percent or more?

Yes No

D. Describe each employment or business relationship with the local government officer named in this section.

4

Signature of person doing business with the governmental entity

Date

Adopted 06/29/2007

Appendix D – No Intent to Submit Form

If your firm has chosen not to submit a proposal for this procurement, please complete this form and submit to:

City of Southlake
Purchasing Division, Department of Finance
1400 Main Street, Suite 440
Southlake, Texas 76092

Please check all items that apply:

- | | |
|---|---|
| <input type="checkbox"/> Do not sell the item(s) required | <input type="checkbox"/> Cannot provide Insurance required |
| <input type="checkbox"/> Cannot be competitive | <input type="checkbox"/> Cannot provide Bonding required |
| <input type="checkbox"/> Cannot meet specifications highlighted in the attached request | <input type="checkbox"/> Cannot comply with Indemnification requirement |
| <input type="checkbox"/> Job too large | <input type="checkbox"/> Job too small |
| <input type="checkbox"/> Do not wish to do business with the City of Southlake | <input type="checkbox"/> Other: _____ |
| <input type="checkbox"/> Cannot submit electronically | |





Company Name (Please print): _____

Authorized Officer Name (Please print): _____


Telephone: (____) _____ Fax: (____) _____



Exhibit 'B'

Updated:    

www.SouthlakeBusinesses.com



Southlake Economic Development
 PH: (817) 748-8039
 FX: (817) 748-8040
 EconDev@ci.southlake.tx.us

Business:

Phone: Fax:

Website:

Location: *TBD Site #:

Address:

Contact F/L:

Title:

Cell: Business Survey

Email:

Mailing:

Ed Notes:

Chamber Member Pet Friendly

Current Business

Open Y/M:

Coming Soon

FTE Employees:

LBR Date:

Sq Ft:

DMWBE

SD-Dining-All

SD-Shopping-All

Story Map ID #:

SD Photo Year:

Menu-Full:

Catering:

Catering Info:

Meeting Accomodations:

Cuisine: (one only)

- American-Homestyle
- Asian
- Bakery-Bagels
- Bar-Grill
- BBQ
- Casual
- Catering-Event Planning
- Coffee-Juice-Wine
- Deli-Cafe
- Ice Cream-Sweets
- Italian
- Mexican-Southwestern
- Seafood
- Steak

Amenity: (all applicable)

- Bar Service
- Breakfast
- Catering
- Delivery
- Gift Cards
- Kids Menu
- Meeting Accommodations
- Patio Dining
- Reservations
- WiFi

SD-One Only

Web Filter 3 - Max

- TBD
- Accessories-Jewelry
- Apparel-Footwear
- Automotive
- Construction
- Department
- Educational
- Electronics-Video
- Financial
- General Business
- Gifts-Cards-Books
- Grocery-Convenience Store
- Health-Beauty
- Health Care
- High Tech
- Hobby-Craft-Art
- Home Furnishings-Accessories
- Hotel
- House-Yard
- Insurance
- Legal
- Manufacturing
- Marketing-Promotion
- Non-Profit
- Office-Mail-Copy
- Personal Services
- Professional Service
- Real Estate
- Recreational-Travel
- Restaurant-Food Service
- Specialty
- Sporting Goods
- Utilities
- Wholesale

Exhibit 'C'

ED Contacts

Economic Development Contact Form

First Last Updated **7/23/2019**     

Organization Title

Phone Ext Affil

Fax Cell City Position

Email Property Mgr

Web Page Notes

Address

APA COC Golf BN-All Consultant Ruler VIP 1 TRS-Buyer

ED 114W-DBJ Broker Site Consult Bus Card Case VIP 2 TRS-Supplier

Flyer 114W-Lunch Developer Fam Consult Padfolio VIP SL TRS-DMO

ED News 114 West Mail CDR Vendor Aerial 2006 (qty) VIP Metro Event Notice

EOC Hrt-NTx CDR Yes Media Invite

F-Facts S-D Guide Prospect Printers Business Survey New Biz List

Visitors Guide

Record: 4182 of 4182 Unfiltered Search