

**REQUEST FOR PROPOSAL #09-1194FL
CITIZEN ACTION TRACKING SYSTEM**

Manatee County, a political subdivision of the State of Florida (hereinafter "Manatee County" or the "County") will receive proposals from individuals, corporations, partnerships, and other legal entities authorized to do business in the State of Florida, for the purpose of furnishing a Citizen Action Tracking System as detailed herein.

DEADLINE FOR CLARIFICATION REQUESTS: Monday, March 23, 2009 shall be the deadline to submit all inquiries, suggestions, or requests concerning interpretation, clarification or additional information pertaining to the Invitation for Bids or the Request For Proposals to the Manatee County Purchasing Office.

This deadline has been established to maintain fair treatment for all potential proposers, while maintaining the expedited nature of the Economic Stimulus that the contracting of this work may achieve.

TIME AND DATE DUE: Proposals will be received until 4:00 p.m., Friday, April 3, 2009, at which time they will be publicly opened. All interested parties are invited to attend this opening.

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Important note: A prohibition of Lobbying has been enacted. Please review paragraph A.17 carefully to avoid violation and possible sanctions.

FOR INFORMATION CONTACT: Frank Lambertson, Contracts Negotiator
PHONE (941) 749-3042/FAX (941) 749-3034
Manatee County, Financial Management Department
Purchasing Division

AUTHORIZED FOR RELEASE: _____


REQUEST FOR PROPOSAL #09-1194FL

SECTION A: INFORMATION TO PROPOSERS

PROPOSERS MUST COMPLY WITH THE FOLLOWING INSTRUCTIONS TO BE CONSIDERED FOR SELECTION.

A.01 OPENING LOCATION

These proposals will be publicly opened at Manatee County Purchasing, 1112 Manatee Avenue West, 8th Floor, Suite 803, Bradenton, Florida 34205, in the presence of County officials at the time and date stated on the cover sheet. All Proposers or their representatives are invited to attend.

Proposals become "Public Records" ten (10) days after the proposal opening or if an award decision is made earlier than this time as provided by Florida Statute 110.071. **No announcement of pricing or review of the proposal documents shall be conducted at the public opening of the proposals.**

A.02 PROPOSAL INFORMATION AND PROPOSAL DOCUMENTS

Bids and Proposals on <http://www.mymanatee.org>

Bid or Proposal documents and the Notices of Source Selection related to those Bids or Proposals are available for download in a portable document format (.PDF) file on the Manatee County web page on the Purchasing tab under "Bids and Proposals." You may view and print these files using Adobe Acrobat software. You may download a free copy of this software (Adobe) from the County's web page if you do not have it.

Manatee County collaborates with the Manatee Chamber of Commerce on distributing solicitations using the RFP Tool web page on the Chambers website: <http://www.Manateechamber.com> to post Bid and Proposal documents in a portable document format (.PDF) file. This step is in addition to the posting on Manatee County Government web pages.

Manatee County may also use an internet service provider to distribute Bids and Proposals. A link to that service <http://www.DemandStar.com>, is provided on this website under the Tab "DemandStar". Participation in the DemandStar system is not a requirement for doing business with Manatee County.

Note: The County posts the Notice of Source Selection seven calendar days prior to the effective date of the award.

IT IS THE RESPONSIBILITY OF EACH VENDOR, PRIOR TO SUBMITTING THEIR BID or PROPOSAL, TO CONTACT THE MANATEE COUNTY PURCHASING OFFICE (see contact information on page one of this document) TO DETERMINE IF ADDENDA WERE ISSUED AND TO MAKE SUCH ADDENDA A PART OF THEIR BID or PROPOSAL.

A public internet connection is available during regular business hours in the lobby of the Purchasing Division. If you have questions which cannot be answered by these sources, please contact the individual named on the front page of the bid or proposal.

A.03 PROPOSAL FORM DELIVERY REQUIREMENTS

Any proposals received after the stated time and date will not be considered. It shall be the sole responsibility of the Proposer to have their proposal delivered to the Manatee County Purchasing office for receipt on or before the stated time and date. If a proposal is sent by U.S. Mail, the Proposer shall be responsible for its timely delivery to the Purchasing Office. Proposals delayed by mail shall not be considered, shall not be opened at the public opening, and arrangements shall be made for their return at the Proposer's request and expense.

A.04 CLARIFICATION & ADDENDA

Each proposer shall examine all Invitation for Bids documents and shall judge all matters relating to the adequacy and accuracy of such documents. Any inquiries, suggestions or requests concerning interpretation, clarification or additional information pertaining to the Request for Proposal shall be made through the Manatee County Purchasing Office. The County shall not be responsible for oral interpretations given by any County employee, representative, or others. The issuance of a written addendum is the only official method whereby interpretation, clarification or additional information can be given.

If any addenda are issued to this Request for Proposal, the County will Broadcast the addenda on the Demand Star distribution system to "Planholders" on this web service, and post the documents on the Purchasing Division's web page at <http://www.mymanatee.org> which can be accessed by clicking on the "Purchasing" button on the left side of the screen and then clicking on the "Bids and Proposals" button. It shall be the responsibility of each proposer, prior to submitting their bid, to contact Manatee County Purchasing (see contact on page 1) to determine if addenda were issued and to make such addenda a part of their bid.

A.05 SEALED & MARKED

Five (5) signed copies of your proposal shall be submitted in one sealed package, clearly marked on the outside "**Sealed Proposal #09-1194FL**" and addressed to:

Manatee County Purchasing
1112 Manatee Avenue West, Suite 803
Bradenton, FL 34205

A.06 LEGAL NAME

Proposals shall clearly indicate the legal name, address and telephone number of the Proposer (company, firm, partnership, individual). Proposals shall be signed above the typed or printed name and title of the signer. The signer shall have the authority to bind the Proposer to the submitted proposal.

A.07 PROPOSAL EXPENSES

All expenses for making proposals to the County are to be borne by the Proposer.

A.08 EXAMINATION OF OFFER

The examination of the proposal and the Proposer generally requires a period of not less than ninety (90) calendar days from the date of the opening of the proposals.

A.09 DISCLOSURE

Upon receipt, responses become "Public Records" and shall be subject to public disclosure consistent with Chapter 119, Florida Statutes. Section 119.071(1)(b)1.a states that sealed bids shall be exempt from inspection or copying until such time as the County provides a notice of a decision or within 10 days after the date the bids are opened, whichever is earlier.

A.10 RESERVED RIGHTS

The County reserves the right to accept or reject any and/or all proposals, to waive irregularities and technicalities, and to request resubmission. Any sole response received by the first submission date may or may not be rejected by the County, depending on available competition and timely needs of the County. The County reserves the right to award the contract to a responsible Proposer submitting a responsive proposal, with a resulting negotiated agreement which is most advantageous and in the best interests of the County. The County shall be the sole judge of the proposal, and the resulting negotiated agreement that is in its best interest and its decision shall be final. Also, the County reserves the right to make such investigation as it deems necessary to determine the ability of any Proposer to perform the work or service requested. Information the County deems necessary to make this determination shall be provided by the Proposer. Such information may include, but shall not be limited to: current financial statements prepared by an independent CPA; verification of availability of equipment and personnel; and past performance records.

A.11 APPLICABLE LAWS

Proposer must be authorized to transact business in the State of Florida. All applicable laws and regulations of the State of Florida and ordinances and regulations of Manatee County will apply to any resulting agreement. Any involvement with any Manatee County procurement shall be in accordance with Manatee County Purchasing Code Ordinance 99-37, as amended. Any actual or prospective Proposer who is aggrieved in connection with the solicitation or award of a contract may protest to the Board of County Commissioners of Manatee County as required in Section 9-101 of the Purchasing Code. A protest with respect to this Request for Proposal shall be submitted in writing prior to the scheduled opening date of this proposal, unless the aggrieved person did not know and could not have been reasonably expected to have knowledge of the facts giving rise to such protest prior to the scheduled opening date of this proposal. The protest shall be submitted within seven calendar days after such aggrieved person knows or could have reasonably been expected to know of the facts giving rise thereto.

A.12 CODE OF ETHICS

With respect to this proposal, if any Proposer violates or is a party to a violation of the Code of Ethics of Manatee County per Manatee County Purchasing Code Ordinance 99-37, Article 3, Ethics in Public Contracting, and/or the state of Florida

per Florida Statutes, Chapter 112, Part III, Code of Ethics for Public Officers and Employees, such Proposer may be disqualified from performing the work described in this proposal or from furnishing the goods or services for which the proposal is submitted and shall be further disqualified from submitting any future proposals for work or for goods or services for Manatee County.

A.13 COLLUSION

By offering a submission to this Request for Proposal the Proposer certifies the Proposer has not divulged to, discussed or compared his proposal with other Proposers and has not colluded with any other Proposer or parties to this proposal whatsoever. Also, Proposer certifies, and in the case of a joint proposal, each party thereto certifies, as to their own organization that in connection with this proposal:

- a. any prices and/or data submitted have been arrived at independently, without consultation, communication or agreement, for the purpose of restricting competition, as to any matter relating to such prices and/or cost data, with any other Proposer or with any competitor;

- b. any prices and/or cost data quoted for this proposal have not been knowingly disclosed by the Proposer prior to the scheduled opening directly or indirectly to any competitor;
- c. no attempt has been made or will be made by the Proposer to induce any other person or firm to submit or not to submit a proposal for the purpose of restricting competition;
- d. the only person or persons interested in this proposal as principal or principals is/are named therein and that no person other than therein mentioned has any interest in this proposal or in the contract to be entered into; and
- e. no person or agency has been employed or retained to solicit or secure this contract upon an agreement or understanding for a commission, percentage, brokerage, or contingent fee, excepting bona fide employees.

A.14 PROPOSAL FORMS

Proposals must be submitted in the format specified in Section B hereof. Additional support information may be included. Tabs are required to identify each item defined in Section B, Form of Proposal, thereby facilitating expedient review of all responses.

A.15 PUBLIC ENTITY CRIMES

In accordance with Section 287.133, Florida Statutes, a person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a proposal on a contract to provide any goods or services to a public entity, may not submit a proposal on a contract with a public entity for the construction or repair of a public building or public work, may not submit proposals on leases or real property to a public entity, may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Section 287.017 for Category Two (as of 1/01/2005 is \$25,000) for a period of 36 months from the date of being placed on the convicted vendor list.

A.16 DRUG FREE WORK PLACE

The Manatee County Board of County Commissioners adopted a policy regarding maintaining a Drug Free Work Place, Resolution R-93-22. Proposers are asked to review the attached copy of the Resolution and provide either a certification of compliance with the program outlined in this Resolution or describe your firm's policy or program as it relates to maintaining a drug free workplace. A Drug Free Work Place Certification is attached to this proposal for this purpose. This response will be considered with the other criteria described herein.

A.17 LOBBYING

After the issuance of any Request for Proposals or Invitations for Bids, prospective bidders, Proposers or any agent, representative or person acting at the request of such bidder or Proposer shall not contact, communicate with or discuss any matter relating in any way to the Request for Proposals or Invitation for Bids with any officer, agent or employee of Manatee County other than the Purchasing Manager or as directed in the Request for Proposals or Invitation for Bids. This prohibition begins with the issuance of any Request for Proposals or Invitation for Bids, and ends upon execution of the final contract or when the invitation or request has been canceled. Violators of this prohibition shall be subject to sanctions as provided in the Manatee County Purchasing Code.

A.18 PUBLIC CONTRACTING AND ENVIRONMENTAL CRIMES CERTIFICATION

In accordance with Ordinance 99-37, adding Article 6, Manatee County Board of County Commissioners adopted a policy prohibiting the award of County contracts to persons, business entities, or affiliates of business entities who have not submitted written certification to the County that they have not been convicted of bribery, attempted bribery, collusion, restraints of trade, price fixing, and violations of certain environmental laws. A Non-Conviction Certification Form is attached for this purpose.

A.19 EQUAL EMPLOYMENT OPPORTUNITY

Manatee County, in accordance with the provisions of Title VI of the Civil Rights Act of 1964 and the Regulations of the Department of Commerce (15 CFR, Part 8) issued pursuant to such Act, hereby notifies all prospective Proposers that they will affirmatively ensure that in any contract entered into pursuant to this advertisement, minority business enterprises will be afforded full opportunity to participate in response to this advertisement and will not be discriminated against on the grounds of race, color, creed, sex, age or national origin in consideration for an award.

A.20 AMERICANS WITH DISABILITIES ACT

The Board of County Commissioners of Manatee County, Florida, does not discriminate upon the basis of any individual's disability status. This non-discrimination policy involves every aspect of the County's functions including one's access to, participation, employment, or treatment in its programs or activities. Anyone requiring reasonable accommodation for the **public meetings** specified herein (i.e. Information Conference or Proposal Opening), shall contact the person named on the first page of this document at least twenty four (24) hours in advance of the activity.

SECTION B: FORM OF PROPOSAL

This section identifies specific information which must be included with each response. Each proposal shall be arranged with tabs identifying the response to each specific item. Proposals must contain:

B.01 MINIMUM QUALIFICATIONS

Proposer must have successfully provided, installed and integrated at least five (5) Citizen Action Tracking Systems, similar in the size and requirements as identified in the RFP in the last three (3) years.

B.02 ADMINISTRATIVE SUBMITTAL

- a. Proposal Signature Form.
- b. Drug Free Work Place Certification (Attachment B).
- c. Public Contracting and Environmental Crimes Certification (Attachment C).

B.03 INFORMATION TO BE SUBMITTED

- a. Proposers Information.
 1. Description of the firm's background and size. Include a statement of qualifications that include the firm's professional credentials and experience in providing the systems enumerated in this RFP.
 2. Identify each principal of the firm and other "key personnel" who will be professionally associated with the County. Describe their respective areas of expertise. Include personalized resumes which identify the qualifications, training and experience of each key personnel.
- b. Executive Summary.
 1. Executive Summary of your proposed system including, a brief overview of your systems solution and key features of the proposed system.
- c. Project Organization.
 1. Present a general project management plan for tasks required to complete the proposed system. Plan shall include the scheduling of all major project milestones and provide coordinating and reporting procedures for tracking progress.

2. Provide a development strategy that defines the facilities and equipment to be supplied by both the Proposer and County. Describe level and extent of the County's staff involvement.
 3. Provide a project team organizational chart for project team members and a brief resume for each of the project team members.
 4. Describe level of involvement anticipated from County's staff. Description shall include a list of tasks the County's staff will be responsible for and the level of expertise required to perform these tasks.
 5. Indicate the involvement of possible subcontractors by listing their name, address, point of contact, telephone number and work to be performed.
- d. Installation.
1. Describe your proposed installation approach and how the individual modules will perform during interim installation periods, when all components are not fully operational.
 2. Detail any hardware, system or network constraints and capabilities.
 3. Describe installation time, testing and acceptance plans.
- e. Testing and Acceptance.
1. Document how the system is tested for specification compliance and acceptance. Documentation shall include method to be used to track system errors and their resolution during the testing phase. Also present frequency of system and how end users of the proposed system are involved in the testing process.
- f. System Architecture.
1. Describe hardware architecture and components utilized by proposed system provide a schematic showing all hardware elements, describe networking scheme of proposed system, provide a schematic of proposed network solution.
 2. Describe basic functional software components of the system, provide a flow chart depicting system flow, provide a list and description of key features of the proposed system, state which components are

part of the basic offering, which components will be developed specifically to meet Manatee County's requirements, and which components if any will be subcontracted to outside vendors.

3. Describe third party software, ad hoc query and reporting tools, and other user interface tools for use with the proposed system. Describe why these tools were selected.
4. Describe in detail the maximum number of concurrent users and expected average response time per on-line transactions. Response time is defined as the time it takes a transaction to complete from time of transmission, until system responds by returning the requested data, provides the requested update or returns an error message. Manatee County acknowledges that response time for database searches and queries depends on size of data base and search parameters.
5. Provide information on any expected response degradation as new users are added to the system.
6. Include expected storage needs of the proposed system.

g. Software Design.

1. Describe each software module of the proposed system. Include functionality of each module, how individual modules interface and description of all data elements within each module. For each module provide a list of all system generated reports and provide examples of these reports.
2. Describe modules not specified in this proposal that are available for integration into the proposed system in the future.
3. Describe third party or "off the shelf" software/tools proposed. Provide details on these tools and how they interface with the proposed system and why these tools were selected.
4. Describe required maintenance procedures that must be routinely performed such as back up procedures or building/re-building of indexes. Describe how these procedures will affect the user and whether they cause any system down time.

- h. Describe any user interfaces proposed for the system and all navigational systems (menus, windows, etc.) that are used. Include a description and examples of screens that are part of the proposed system and how the

screens will be implemented. If commercial user tools are proposed, discuss them.

- i. Provide minimum specifications for a user work-station. User work-stations shall not use proprietary hardware. All user work-stations and consoles proposed shall meet the standards of the Americans with Disabilities Act and be as ergonomically sound as possible to prevent injuries associated with sedentary jobs and repetitive motion.
- j. Server Configuration.
 - 1. Describe the proposed hardware that shall be configured to allow for conversion of historical data plus future growth for a minimum three year period without addition or replacement of hardware. Proposed hardware must exhibit linear growth within the same family of hardware without hardware replacement or upgrade.
 - 2. Provide documentation as to system reliability and how the proposed system will accomplish the percentage of up-time proposer guarantees that the system will be available.
- k. Describe how network system protocol will be compatible with the County's network facilities
- l. Detail how you propose to coordinate applications and interfaces.
- m. Describe existing security functions as it relates to the Scope of Services.
- n. Describe Ad Hoc reports generated by the system, including all standard reports.
- o. Provide costs and equipment brand name for storage medium to be used for system backup, and recommend total quantity of storage medium required to maintain adequate cyclical database backup.
- p. Documentation/Online Help - The proposer shall describe all forms of documentation and online help provided with the proposed system, including support screen dumps/examples of each. Include examples of all hardcopy system, user, operations, and other manuals developed for the system. State any copyright restrictions to the documentation.
- q. Training - Describe your general approach to customer training. Describe each phase of your training, syllabus, and your approach to customized training. Provide training recommendations and an estimate of time required to perform training on the proposed system.

- r. Customer Support.
1. The proposer shall describe the level of customer support which will be provided.
 2. Describe responsiveness in the case of system failure. System failure is described as a system failure which does not respond to normal operational cures.
 3. Describe how requests for enhancements will be handled (subsequent to installation and final acceptance of the proposed system). Document the frequency of system and documentation upgrades and how they relate to your maintenance program. Indicate costs associated if any, and provide per hour of itemized fee structure for future modification and enhancement.
- s. Address the warranty period and the post warranty approach. Describe how you will handle the vendor host systems. If you use commercial products within your system, discuss the issues of licensing. Discuss any potential changes to your maintenance policy for the described system. Describe the length of time support can be expected if continuing upgrades to the system are discontinued.
- t. Your cost proposal shall be in accordance with Attachment D.
- u. Other questions:
1. Access to knowledge base if a resident has a particular question?
 2. How are roles defined and are there set roles to reduce system administration times?
 3. List any additional functionality not previously described?
 4. List any and all browsers and versions the use interface will operate on, any limitations?
 5. Provide information describing the future road map of your system?
 6. Provide your approach to a low level business process review?

- u. Submit any other information which would assist the County in the evaluation of your proposal.

NOTE: The County reserves the right to make such investigation and solicit additional information or submittals as it deems necessary to determine the ability of any Proposer to perform the Scope of Services stated in this Request for Proposal.

SECTION C: SELECTION

C.01 EVALUATION FACTORS

Evaluation factors are price, design and perceived ability of the Proposer to perform the Scope of Services as stated in this Request for Proposal in the most timely and efficient manner, and the proposal(s) which will overall best meet the needs of Manatee County as determined from the responses to this Request for Proposal and subsequent investigation by the County.

C.02 RELATIVE IMPORTANCE OF EVALUATION FACTORS

No weight has been assigned to the Evaluation Factors stated above.

C.03 PRELIMINARY RANKING

A Selection Committee may determine from the response to this Request for Proposal and subsequent investigation as necessary, the Proposers most susceptible of being selected for award.

C.04 REVIEW OF PROPOSERS AND PROPOSALS

Review shall be conducted with responsible Proposers who may be reasonably susceptible of being selected for award, for the purposes of clarification to assure full understanding of and conformance to the solicitation requirements, the abilities of the Proposer, and the proposal submitted.

Firms responding to this Request for Proposal shall be available for presentation/interviews, to the Selection Committee and/or Board of County Commissioners upon notification from the Purchasing Office at a time and date determined by the County.

C.05 SELECTION FOR NEGOTIATION

The Proposers whose ability and proposal is determined to be the most advantageous to the County, taking into consideration the evaluation factors set forth in this Request for Proposal, shall be recommended to the Board of County Commissioners for authorization to negotiate an agreement for the stated Scope of Services.

C.06 AWARD

Award of an agreement is subject to the successful negotiations and the vote of the Board of County Commissioners to authorize execution of the agreement.

SECTION D: NEGOTIATION OF THE AGREEMENT

D.01 GENERAL

The following general terms and conditions apply to the proposal submitted for consideration and the subsequent negotiations:

- a. The proposal will serve as a basis for negotiating an agreement.
- b. Upon submission, all proposals become the property of the County which has the right to use any or all ideas presented in any proposal submitted in response to this Request for Proposal whether or not the proposal is accepted.
- c. All products and papers produced in the course of this engagement become the property of the County upon termination or completion of the engagement.

D.02 AGREEMENT

The selected Proposers shall be required to negotiate a formal agreement, in a form acceptable to Manatee County.

The Manatee County Board of County Commissioners will be presented the negotiated agreement as the best and final offer for consideration of award and execution. The Board of County Commissioners shall determine if award of the agreement is to be: considered; rejected and direct further negotiations; rejected and terminate negotiations; or accepted, authorizing the chairman to execute the agreement.

SECTION E: SCOPE OF SERVICES

E.01 PROJECT BRIEF

Manatee County Government is issuing a Request for Proposal (RFP) for a Citizen Action Tracking System. This RFP is specifically intended for firms with the necessary experience and personnel required to implement a county-wide Citizen Action Tracking System in accordance with the requirements outlined in the Scope of Work of this document.

Manatee County Government is located on the west coast of central Florida, in Manatee County, with a residential population of 330,000. Manatee County Government is structured by 15 departments and approximately 1,705 employees. Manatee County provides many services including public safety, parks, recreation, housing, libraries, transportation, utilities and general administrative and support services.

The County plans to include all 15 departments in the system with an estimated 85 request types.

Manatee County Government has set high standards for itself in terms of service offerings, communication with our community and meeting the requests of our citizens. In an effort to further our goal of serving our community we are looking for a Citizen Action Tracking System to aid us in entry, assignment and tracking of various requests made by our community.

Manatee County Government has multiple types of customers: residents, non residents visiting the county and surrounding cities, local business owners, and businesses who serve our community. Given the diversity of our customer base, any solution we implement will need to be able to monitor and track requests from any of our customers.

Our customer requests vary seasonally and in complexity. A significant number of our Citizens do not know where to turn to for their needs and internally we spend time and resources searching for this information. Requests that involve multiple divisions often have manual task hand off, which limits the ability to keep apprised of a task's status. Additionally, we are unable to present a comprehensive global view of citizen requests to our County Administrator and County Commissioners.

The County is looking for a systematic approach to our manual citizen request process. This system will be used by staff and citizens to submit requests and view request status. Citizens will be able to do County business at their leisure by entering requests anytime via the web. Most importantly, this system will have the ability to track customer satisfaction on the fulfillment of their request.

The County would also like to begin building a knowledge base of resolutions. The

knowledge base would be available internally and externally via the web so that our staff is better informed and Citizens and other customers can find answers easily also.

E.02 BACKGROUND

Current state of Citizen Action processes:

- A. Request Receipt Channels are: via phone, person, email, website, postal mail and fax.
- B. Call Logs: Many departments do not log calls. If calls are logged they are done so manually. Some are trying to manually classify and tally the types of requests for their department. Without this data is it difficult to determine process efficiencies.
- C. Manual research is being conducted for escalation requests and routing of misplaced requests. This can be time consuming. A single department could handle 50 plus different requests per month, some with standard answers and some with unique resolutions.
- D. Misplaced citizen calls to the incorrect department take staff time to research the correct department to forward the citizen on to.
- E. When transferring a call, staff may have difficulty getting a live person, which citizens prefer.
- F. Request turnaround time: Our Citizen Action Policy states that requests will be answered within 10 business days. However, if the response takes additional research, the turnaround time can vary widely depending on the department's priority of the request.
- G. Complaints: Most departments do not keep any formal information on complaints unless correspondence has been done through the generic department email.
- H. Driving Directions: Our front line staff is patient and goes above and beyond on direction requests. They often sit on the phone with the driving resident and walk them through how to get where they are going. This results in a long phone call.
- I. Citizen Special Needs: There are various languages spoken by our residents. Front line staff identified Spanish as the highest volume next to English.
- J. Hearing impaired customers: We currently use a TDD line and provide translation services for meetings.

E.03 REQUIREMENTS AND SCOPE OF SERVICE

A. User Interface

1. Citizens will access the Citizen Action Tracking System from anywhere within our County website, <http://www.mymanatee.org>.
2. We shall have the ability to make the Citizen Action Tracking System user interface to look like our current web site.
3. The Citizen Action Tracking System web interface will be used by both staff and citizens. Therefore, the system needs to be easy to use with little or no training.
4. In an effort to ease data entry time the system shall have easy navigation, field tabbing, and pull down menus.
5. To ensure all necessary data is captured the first time, we need the ability to mark fields as required.
6. The system shall have the ability to create logons and passwords and a link for users to retrieve forgotten passwords or user names. The system shall have the flexibility to allow for a customer to create multiple accounts.
7. The system shall allow for customized forms, questions and responses.
8. In an effort to reduce data entry the system shall be able to pre-populate fields already in the database. Additionally, the system shall be able to accept a data import of our customer information from an already existing system.
9. There shall be an online help feature.
10. The system shall allow residents and non-residents to log requests in the system.
11. Access to knowledge base if a resident has a particular question.

B. Features

1. Work flow will be critical to a successful implementation of a Citizen Action Tracking System for the County.

- a. Workflow shall be customizable by request type with the ability to edit or remove components.
 - b. Reminder and escalation notices shall be generated on a predefined interval by request type.
 - c. Workflow shall allow for sequential and parallel tasks.
 - d. Closing of a task shall trigger a notification to the next task owner to alert them that their portion of the work needs to occur.
 - e. Closing the last task in the work flow shall automatically close the request.
 - f. Closing of a request shall automatically notify the requestor the request is completed.
 - g. Workflow shall have the ability to assign tasks based on location or other criteria.
2. User accounts can be created for staff or external customers.
 3. There shall be a visual map of workflow to aid in creation and fine tuning.
 4. Request shall be automatically assigned a unique tracking identification number.
 5. The system shall allow the ability to customize data fields by request type.
 6. There shall be an audit trail for each request to determine who worked on the request and what was done.
 7. Users shall be able to attach documents to a request like a picture, map or letter.
 8. The system shall have a spell check feature.
 9. The system shall allow comments or notes to be marked as "private" or "public".
 10. The system shall allow request types to be private or public.
 11. If a citizen's question can be answered automatically, the system shall provide the requestor with a prepared response immediately (such as FAQ's). If the question is more unique in nature, the system shall allow for customized responses. Employees that have institutional knowledge will be able to build the county knowledge base for others to draw on.

12. Automatically email the requestor that the request has been received and include the unique request identification number.
13. Allow for an alternative designee for notification, escalation, or task assignment, while staff is out of office or on vacation.
14. Generate a customer survey upon request completion and store customer responses so they can be reported on.
15. Allow for statistical reporting (i.e.: time to complete request, # of similar requests)

C. Core Technology

1. The Citizen Action Tracking System shall be built on open architecture technology.
 - a. using standard x64 architecture
 - b. using standard networking protocol, TCP/IP
 - c. using standard software components
 - d. back end database shall be certified on Oracle.
 - e. County would prefer the system be developed in J2EE, since it is our internal development standard
 - f. system shall conform to unix or linux security standards
 - g. user interface shall be web based and conform to web standards
 - h. runs and supported in virtualized environment
2. County would prefer the system to be hosted on-site at the County.
3. The user interface shall work on various browser types and versions.
4. The system shall be scalable in terms of data, number of users and ability to integrate with various systems.
5. The system shall allow for user defined fields in the database.
6. The web system must be 508C (ADA) compliant. You can obtain additional information at www.section508.gov.

D. System and Data Integration

1. The system shall have the ability to receive information from other systems and send information to other systems.
2. The Citizen Action Tracking System shall be able to work with our current web

content management system.

- a. The FAQ feature is enabled and populated and this will be the system of record so users do not need to navigate to two separate FAQ pages.

3. Citizen Action Tracking System integrate with Active Directory, enabling us to build access levels based on group policy. Users shall be able to belong to more than one group in the CRM system.

4. The system shall have the ability to work with Microsoft Office applications for document creation and attachments to requests. Also, it shall allow for pictures or maps to be attached and viewed. System shall also handle Adobe PDF format viewing.

E. Reports

1. Required reports:

- a. by request type
- b. by status
- c. by requestor
- d. by assigned to
- e. by geo location request originated
- f. by commission district
- g. audit trail
- h. by who entered request and where routed
- i. time to completion
- j. resources used
- k. number of touch points

2. Executive Management Reports: metrics on delivery.

3. The system shall allow for custom reports and allow users to customize the look and feel including adding our County Logo.

4. Reports shall allow for a preview prior to printing, so the user has an opportunity to verify the data and format expected.

5. Reports shall be able to be downloaded to an excel worksheet.

6. Ad hoc reporting shall be available for use. Knowledge Based cube technology is desirable.

7. Use of Microsoft Reporting Services is most desirable.

F. Support

1. Software Update and Maintenance Agreement shall include but not be limited to: support, ticket prioritization, support tiers, guaranteed turnaround time and support hours.
2. The ability to have 24 by 7 support for system down issues.
3. The ability to submit issue ticket on-line.
4. Custom integration completed and delivered by your company shall be included in the support contract service level agreement.

G. Professional Services

1. This system will be rolled out to all 15 departments in phase one with an estimated 85 requests types.

H. Training of Staff

1. Appropriate training shall be provided to County staff to include the System Administrator.

PROPOSAL SIGNATURE FORM
RFP #09-1194FL

Firm Name

Mailing Address:

(_____) _____
Telephone Number

City, State, Zip Code

The undersigned attests to his (her, their) authority to submit this proposal and to bind the firm herein named to perform as per agreement. If the firm is selected by the County the undersigned certifies that he/she will negotiate in good faith to establish an agreement to provide a citizen action tracking system according to the requirements of this RFP #09-1194FL.

Signature

Witness Signature

Date: _____

Date: _____

Name and Title of Above Signer

Name and Title of Above Signer

Address of any branch office
proposed to service Manatee County other than above

Name and Title of Firm's Representative for Manatee County

Telephone Number of Firm's Representative for Manatee County

ATTACHMENT "A"

RESOLUTION R-93-22

A RESOLUTION OF THE BOARD OF COUNTY COMMISSIONERS OF MANATEE COUNTY, FLORIDA, IMPLEMENTING ¶3-101(7)3(1) OF THE MANATEE COUNTY PROCUREMENT CODE (ORDINANCE 84-02 AS AMENDED) TO ESTABLISH MINIMUM REQUIREMENTS FOR BIDDERS WITH RESPECT TO MAINTAINING A DRUG FREE WORKPLACE; REQUIRING WRITTEN CERTIFICATION TO THE COUNTY OF COMPLIANCE WITH THE REQUIREMENTS ESTABLISHED HEREIN; AND PROVIDING FOR SEVERABILITY AND EFFECTIVE DATE.

WHEREAS, the Board of County Commissioners of Manatee County recognizes that substance abuse is a complex societal problem that continues to threaten the welfare of the residents and community; and

WHEREAS, the Board of County Commissioners considers substance abuse on the job to be an unsafe and counter-productive work practice; and

WHEREAS, consistent with its policy to promote a safe work environment and encourage personal health for all citizens of Manatee County, the Commission finds it necessary to combat substance abuse in the workplace by promoting education and awareness; and

WHEREAS, consistent with the Drug Free Workplace Act (§112.0455, Florida Statutes) and policies applicable to Manatee County employees pursuant to Resolution R-93-10, the Board of County Commissioners of Manatee County has determined that it is necessary and in the best interest of the County to adopt the drug free workplace requirements for persons or entities contracting with Manatee County; and

WHEREAS, ¶3-101(7)B of the Manatee County procurement Code (Ordinance 84-02, as amended) authorizes the adoption of requirements for maintaining a drug free workplace applicable to persons or entities bidding on contracts with Manatee County.

NOW, THEREFORE, BE IT RESOLVED by the Board of County Commissioners of Manatee County, Florida, as follows:

1. **Certification Required:** No person or entity submitting a bid pursuant to ¶3-101 shall be awarded or receive a county contract for public improvements, procurement of goods or services (including professional services) or a county lease, franchise,

concession or management agreement, unless such person or entity has submitted a written certification to the county that it will provide a drug free workplace by:

- a. providing a written statement to each employee notifying such employee that the unlawful manufacture, distribution, dispensation, possession or use of a controlled substance as defined in §893.02(4), Florida statutes, as the same may be amended from time to time, in the person's or entity's workplace is prohibited specifying the actions that will be taken against employees for violation of such prohibition. Such written statement shall inform employees about:
 - (i) the dangers of drug abuse in the workplace;
 - (ii) the person's or entity's policy of maintaining a drug free environment at all its workplaces, including but not limited to all locations where employees perform any task relating to any portion of such contract, business transaction or grant;
 - (iii) any available drug counseling, rehabilitation, and employee assistance programs; and
 - (iv) the penalties that may be imposed upon employees for drug abuse violations.
- b. Requiring the employee to sign a copy of such written statement to acknowledge his or her receipt of same and advice as to the specifics of such policy. Such person or entity shall retain the statements signed by its employees. Such person or entity shall also post in a prominent place at all of its workplaces a written statement of its policy containing the foregoing elements (i) through (iv).
- c. Notifying the employee in the statement required by subsection 1. that as a condition of employment the employee will:
 - (i) abide by the terms of the statement; and
 - (ii) notify the employer of any criminal drug statute conviction for a violation occurring in the workplace no later than five (5) days after such a conviction.

- d. At all times pertinent to the performance of any contract with Manatee County, notify the county within ten (10) days after receiving notice under subsection c. from an employee or otherwise receiving actual notice of such conviction.
 - e. Imposing appropriate personnel action against such employee up to and including termination; or requiring such employee to satisfactorily participate in a drug abuse assistance or rehabilitation program approved for such purposes by a federal, state or local health, law enforcement, or other appropriate agency.
 - f. Making a good faith effort to continue to maintain a drug free workplace through implementation of sections a. through e. of this subsection.
2. **Severability.** If any part, section, subsection, or other portion of this Resolution, or any application thereof to any person or circumstances declared to be void, unconstitutional, or invalid for any reason, such part, section, subsection, or other portion, or the prescribed application thereof, shall be severable, and the remaining provisions of this Resolution, and all applications thereof not having been declared void, unconstitutional or invalid, shall remain in full force and effect.
 3. **Effective Date.** This Resolution shall take effect ninety (90) days after adoption by the Board of County Commissioners.

ADOPTED in open session by a majority of the duly elected Board of County Commissioners of Manatee County, Florida, this 2nd day of February, 1993.

**ORIGINAL DOCUMENT SIGNED BY BOARD OF COUNTY COMMISSIONERS
CHAIRMAN MS. LARI ANN HARRIS ON FEBRUARY 2, 1993 AND IS ON FILE AT
MANATEE COUNTY CLERK'S OFFICE.**

<R93-22>

ATTACHMENT "B"

Drug Free Work Place Certification

SWORN STATEMENT PURSUANT TO RESOLUTION R-01-36 SECTION 4, E (1) (a)
MANATEE COUNTY PURCHASING POLICIES, ON DRUG FREE WORK PLACES

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

This sworn statement is submitted to the Manatee County Board of County Commissioners by:

_____ for _____
[print individual's name and title] [print name of entity submitting sworn statement]

whose business address is: _____

and (if applicable) its Federal Employer Identification Number (FEIN) is _____ (If the entity has no FEIN, include the Social Security Number of the individual signing this sworn statement: _____)

I understand that no person or entity shall be awarded or receive a county contract for public improvements, procurement of goods or services (including professional services) or a county lease, franchise, concession or management agreement, or shall receive a grant of county monies unless such person or entity has submitted a written certification to the County that it will provide a drug free work place by:

(1) providing a written statement to each employee notifying such employee that the unlawful manufacture, distribution, dispensation, possession or use of a controlled substance as defined by §893.02(4), Florida Statutes, as the same may be amended from time to time, in the person's or entity's work place is prohibited specifying the actions that will be taken against employees for violation of such prohibition. Such written statement shall inform employees about:

- (i) the dangers of drug abuse in the work place;
- (ii) the person's or entity's policy of maintaining a drug free environment at all its work places, including but not limited to all locations where employees perform any task relating to any portion of such contract, business transaction or grant;
- (iii) any available drug counseling, rehabilitation, and employee assistance programs; and
- (iv) the penalties that may be imposed upon employees for drug abuse violations.

(2) Requiring the employee to sign a copy of such written statement to acknowledge his or her receipt of same and advice as to the specifics of such policy. Such person or entity shall retain the statements signed by its employees. Such person or entity shall also post in a prominent place at all of its work places a written statement of its policy containing the foregoing elements (i) through (iv).

(3) Notifying the employee in the statement required by subsection (1) that as a condition of employment the employee will:

- (i) abide by the terms of the statement; and
- (ii) notify the employer of any criminal drug statute conviction for a violation occurring in the work place no later than five (5) days after such a conviction.

(4) Notifying the County within ten (10) days after receiving notice under subsection (3) from an employee or otherwise receiving actual notice of such conviction.

(5) Imposing appropriate personnel action against such employee up to and including termination; or requiring such employee to satisfactorily participate in a drug abuse assistance or rehabilitation program approved for such purposes by a federal, state, or local health, law enforcement, or other appropriate agency.

(6) Making a good faith effort to continue to maintain a drug free work place through implementation of sections (1) through (5) stated above.

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CONTRACTING OFFICER FOR MANATEE COUNTY IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND THAT ANY CONTRACT OR BUSINESS TRANSACTION SHALL PROVIDE FOR SUSPENSION OF PAYMENTS, OR TERMINATION, OR BOTH, IF THE CONTRACTING OFFICER OR THE COUNTY ADMINISTRATOR DETERMINES THAT:

- (1) Such person or entity has made false certification.
- (2) Such person or entity violates such certification by failing to carry out the requirements of sections (1), (2), (3), (4), (5), or (6) or Resolution R-01-36 Section 4, E (1) (a) or
- (3) Such a number of employees of such person or entity have been convicted of violations occurring in the work place as to indicate that such person or entity has failed to make a good faith effort to provide a drug free work place as required by Resolution R-01-36 Section 4, E (1) (a).

[Signature]

STATE OF FLORIDA
COUNTY OF _____

Sworn to and subscribed before me this _____ day of _____, 20____ by _____.

Personally known _____ OR Produced identification) _____
(Type of identification)

Notary Public Signature My commission expires _____

[Print, type or stamp Commissioned name of Notary Public]

ATTACHMENT "C"

PUBLIC CONTRACTING AND ENVIRONMENTAL CRIMES CERTIFICATION

SWORN STATEMENT PURSUANT TO ARTICLE 6,
MANATEE COUNTY PURCHASING CODE

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

This sworn statement is submitted to the Manatee County Board of County Commissioners by _____
[print individual's name and title]

_____ for _____
[print name of entity submitting sworn statement]

whose business address is: _____

and (if applicable) its Federal Employer Identification Number (FEIN) is _____. If the entity has no FEIN, include the Social Security Number of the individual signing this sworn statement: _____

I understand that no person or entity shall be awarded or receive a county contract for public improvements, procurement of goods or services (including professional services) or a county lease, franchise, concession or management agreement, or shall receive a grant of county monies unless such person or entity has submitted a written certification to the County that it has not:

(1) been convicted of bribery or attempting to bribe a public officer or employee of Manatee County, the State of Florida, or any other public entity, including, but not limited to the Government of the United States, any state, or any local government authority in the United States, in that officer's or employee's official capacity; or

(2) been convicted of an agreement or collusion among bidders or prospective bidders in restraint of freedom of competition, by agreement to bid a fixed price, or otherwise; or

(3) been convicted of a violation of an environmental law that, in the sole opinion of the County's Purchasing Director, reflects negatively upon the ability of the person or entity to conduct business in a responsible manner; or

(4) made an admission of guilt of such conduct described in items (1), (2) or (3) above, which is a matter of record, but has not been prosecuted for such conduct, or has made an admission of guilt of such conduct, which is a matter of record, pursuant to formal prosecution. An admission of guilt shall be construed to include a plea of nolo contendere; or

(5) where an officer, official, agent or employee of a business entity has been convicted of or has admitted guilt to any of the crimes set forth above on behalf of such and entity and pursuant to the direction or authorization of an official thereof (including the person committing the offense, if he is an official of the business entity), the business shall be chargeable with the conduct herein above set forth. A business entity shall be chargeable with the conduct of an affiliated entity, whether wholly owned, partially owned, or one which has common ownership or a common Board of Directors. For purposes of this Form, business entities are affiliated if, directly or indirectly, one business entity controls or has the power to control another business entity, or if an individual or group of individuals controls or has the power to control both entities. Indicia of control shall include, without limitation, interlocking management or ownership, identity of interests among family members, shared organization of a business entity following the ineligibility of a business entity under this Article, or using substantially the same management, ownership or principles as the ineligible entity.

Any person or entity who claims that this Article is inapplicable to him/her/it because a conviction or judgment has been reversed by a court of competent jurisdiction, shall prove the same with documentation satisfactory to the County's Purchasing Director. Upon presentation of such satisfactory proof, the person or entity shall be allowed to contract with the County.

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CONTRACTING OFFICER FOR MANATEE COUNTY IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND THAT ANY CONTRACT OR BUSINESS TRANSACTION SHALL PROVIDE FOR SUSPENSION OF PAYMENTS, OR TERMINATION, OR BOTH, IF THE CONTRACTING OFFICER OR THE COUNTY ADMINISTRATOR DETERMINES THAT **SUCH PERSON OR ENTITY HAS MADE FALSE CERTIFICATION.**

[Signature]

STATE OF FLORIDA
COUNTY OF _____

Sworn to and subscribed before me this _____ day of _____, 20____ by _____.

Personally known _____ OR Produced identification _____
[Type of identification]

Notary Public Signature My commission expires _____

[Print, type or stamp Commissioned name of Notary Public]

Signatory Requirement - In the case of a business entity other than a partnership or a corporation, this affidavit shall be executed by an authorized agent of the entity. In the case of a partnership, this affidavit shall be executed by the general partner(s). In the case of a corporation, this affidavit shall be executed by the corporate president.

ATTACHMENT "D"

PRICING STRUCTURE

Please break down the pricing of your proposal into the following sections:

A. HARDWARE

1. Cost of system hardware, including file servers, front-end processors, disk drivers, tape drivers, cabling, modems, etc.
2. Network hardware.
3. Printers, showing the number, type and cost of printers recommended.

B. SOFTWARE

1. Operating systems, including utilities, compilers, etc
2. Networking software
3. Relational Data Base Management System and required tools.
4. Software required for user workstations.
5. Application software (list for each module separately)
 - a. Base price for system as is, without modifications. List all modules including the base system.
 - b. Cost and staff hours for proposed modifications, listed separately, including the reference number pertaining to the system requirement being addressed.
 - c. Cost and staff hours for each interface, priced separately.
 - d. Cost of any third party or off-the-shelf software proposed, each priced separately.
 - e. Cost of any optional features available, but not required in this RFP. These costs should not be reflected in the total system price.
6. Data conversion costs (be sure to include converted data in estimates of storage medium required in hardware section).

- C. **DOCUMENT COSTS**
- D. **TRAINING COSTS**
- E. **PROJECTED MAINTENANCE AND SUPPORT COSTS**
- E. **PROJECT ADMINISTRATION COSTS** (including travel, transition planning, installation etc...)