



Request for Proposal

Project Name: Constituent Relationship Management (CRM) Tool

Issue Date: 09/28/2026

Responses Due: 11/06/2026

Proposals to be Received by 5:00 PM Eastern

Submit Proposals to:

Data Office RFP Coordinator

Email: dataoffice@cityofrochester.gov



[Table of Contents](#)

1.0 Project Overview	3
2.0 Requirements (Form 1)	5
3.0 Implementation Services (Form 2)	10
4.0 Hosted Managed Services (Form 3).....	11
5.0 IT Questionnaire (Form 4)	11
6.0 Data Requirements (Form 5)	11
7.0 Project Team (Form 6).....	12
8.0 Cost Proposal (Form 7)	12
9.0 Vendor Information (Form 8)	13
10.0 Proposal Submission	14
11.0 Selection Process.....	17
12.0 Terms and Conditions.....	19
13.0 Appendices.....	23
Appendix A: City’s Standard Software as a Service Contract Template.....	23
Appendix B – To be used as Professional Service Staffing Proposal	24
Appendix C - MWBE Utilization Plan for Professional Services.....	26



City of Rochester - Constituent Relationship Management (CRM)

1.0 Project Overview

1.1 Introduction

This Request for Proposal (RFP) is issued by The City of Rochester to solicit proposals from qualified vendors for the provision and implementation of a comprehensive Constituent Relationship Management (CRM) tool ("Project").

The City of Rochester (City) is committed to delivering responsive, personalized, and equitable service to everyone who contacts City Hall. A community member's experience engaging with the City is currently inconsistent across departments, largely due to a lack of a unified view of an individual's prior requests, permits, complaints, or interactions. As a result, staff often lack the context needed to fully understand the constituent's needs. To address this gap, the City is seeking a CRM solution that serves as a true digital front door - connecting residents to services, programs, and staff across departments, and ensuring no request or conversation is lost, even across staff transitions.

Community Profile

The City of Rochester covers approximately 37 square miles, has a population base of 208,000 Constituents and is located within Monroe County, New York.

The lists below represent a baseline of services provided to constituents. However, a more complete profile can be found by accessing the [City's 2026-27 Budget](http://www.cityofrochester.gov/budget) (<http://www.cityofrochester.gov/budget>) and navigating to the Operating Departments section. The Critical Processes detailed for each department in the budget provide a more comprehensive and detailed view of specific services.

Examples of Services for the Rochester community Constituents

Business & Housing Development

- Licensing, Code Enforcement & Compliance
- Public Safety (Police, Fire, Emergency Communications/311 Call Center)
- Community and Human Services including Crisis Intervention
- Recreation and Youth Services including Athletics, Education, and Workforce Development
- Environmental Services including snow plowing, solid waste pickup, and a water utility

Examples of internal Support of Service Delivery

- Communications and Constituent Services
- Oversight of Revenue Collection and Taxation
- Internal Control and Oversight

This RFP outlines our requirements for a CRM tool, including functional capabilities, technical specifications, implementation services, and ongoing support. We seek a vendor who can provide a solution that improves how community members experience City services, enables proactive and targeted outreach, and gives staff the tools to deliver consistent, well-informed service regardless of which department receives a call. We seek a proven track record



City of Rochester - Constituent Relationship Management (CRM)

of successful implementations in local government, and a strong understanding of the operational realities of serving a diverse constituent base.

We invite qualified vendors to submit proposals that demonstrate their ability to meet our requirements and help us build lasting trust with community members through better service. This document provides the necessary information for vendors to prepare and submit their proposals. We look forward to receiving your proposals and establishing a mutually beneficial partnership.

1.2 About the Current Systems

Our current constituent data environment is fragmented across departmental systems, spreadsheets, and paper processes, including Infor Public Sector, Verint Case Management, Constant Contact, Microsoft Access-based department tools (such as Cemetery records), and various department-specific spreadsheets and desktop tools. As a result, we face significant hurdles in effectively leveraging our data assets. Examples of current challenges include:

- Fragmented constituent data spread across department systems, spreadsheets, and paper records, with no single source of truth.
- No CRM or unified constituent profile, making it difficult to see a community member's full history of service requests, permits, complaints, and program participation.
- Reactive engagement and an inability to segment constituents for proactive, targeted, and equitable outreach.
- Siloed 311, email and internal service delivery systems with no shared constituent identifier, preventing a complete view of interactions across departments.
- Manual reconciliation of constituent records across Infor Public Sector, Verint Case Management, Constant Contact, and department-specific tools such as Microsoft Access, increasing the risk of errors and duplicate records.
- Limited visibility into engagement trends, service gaps, and department-level performance, hindering data-driven decision-making.

1.3 About this RFP

This RFP document includes 11 sections plus appendices outlining the City's requirements for a CRM solution. We ask that vendors complete all parts of the accompanying Excel spreadsheet titled "RFP Response Forms Tables Template_CRM" It contains eight separate worksheets, which are briefly described in this RFP document. Some of those sheets require that responses be entered into the sheet and some of them direct respondents to answer in their narrative document. Vendors are encouraged to submit collaborative proposals with partners who will help to enhance the final product.

Additionally, Vendors are required to submit a 30-minute video demonstrating the must-have requirements illustrated in the following sections.



City of Rochester - Constituent Relationship Management (CRM)

2.0 Requirements (Form 1)

2.1 Requirements for the Application

The City of Rochester has outlined key system requirements in Form 1 -- Requirements. If any of the requirements are to be addressed by third-party partners as part of your proposal, please indicate any relevant information about this partnership and include that detail in the cost proposal.

2.2 Summary of Requirements

Our current environment necessitates a centralized, constituent-first platform that enables us to:

- **Unify the Constituent Record:** Establish a single, authoritative, 360-degree constituent profile that consolidates service requests, permits, complaints, program participation, communication preferences, and demographic or contact information across every **touchpoint**.
- **Consolidate Departmental Data:** The CRM solution must integrate constituent data across multiple City departments, including Environmental Services (Refuse and Utilities), the Finance Department (tax bills and other receivables), and Neighborhood and Business Development functions such as Permits, Code Enforcement, and Neighborhood Service Centers (NSCs). It must also incorporate data from the Department of Recreation and Human Services (DRHS), 311/Customer Service, Police, Fire, and other operational units. Integration should support real-time or near real-time synchronization and enable mapping across inconsistent data structures to create a unified, accurate, and actionable constituent profile.
- **Modernize Communication Management:** Track multi-channel communications (phone, email, in-person, web portal), manage templates for standardized responses, trigger notifications for follow-up actions, and integrate existing communication platforms such as Constant Contact.
- **Enhance Service Delivery:** Enable personalized, proactive outreach and service recommendations, configurable workflows, communication-preference management, and structured feedback and satisfaction tracking.
- **Support Case Management:** Track issues and service requests across departments with escalation protocols, cross-departmental collaboration tools, SLA monitoring, and compliance reporting.
- **Deliver Data-Driven Insights:** Surface patterns in constituent engagement, recurring requests, and areas of high need; support prescriptive and predictive analytics that reduce escalations; and report on trends, needs, and efficiency-related KPIs.
- **Maintain Governance with Decentralized Operations:** Preserve a single, centrally governed constituent identity while allowing individual departments to manage their own department-specific data, workflows, and queues.

2.3 Requirement Scenarios

The following scenarios reflect the City of Rochester's current challenges and aspirations. Vendors are encouraged to provide tailored assessments and approaches that demonstrate how their solution advances the City's three core goals:

- ✓ Modernized Constituent Engagement - A unified digital bridge between the City and constituents across all channels.
- ✓ Complete 360° Operational View - A consolidated, cross departmental view of constituent identity, service history, and interactions.
- ✓ Centralized Data Hub - A secure, authoritative master database that powers coordinated service delivery across departments.

These goals guide the requirement scenarios below.



City of Rochester - Constituent Relationship Management (CRM)

Constituent Identity & Master Data Management (MDM)

The CRM must maintain a single, authoritative constituent record across all departments. Vendors should describe:

- How constituent records are created, updated, and maintained over their lifecycle.
- How verified data is protected from being overwritten when multiple departments contribute updates.
- Duplicate detection, flagging, and merging capabilities.
- Contact verification workflows (email, phone, USPS/geocoding address validation).
- How conflicting data from different departments is resolved.
- Audit logging for every change, including who, what, when, and source system.
- Cross system ID mapping (Verint, NSC Excel, R-Central, Constant Contact, etc.) to maintain a unified identity.
- Support for multiple household members, multiple addresses, multiple phone numbers, and multiple emails.

This foundation enables a secure, centralized data hub that powers downstream workflows and analytics.

Centralized Data Governance & Decentralized Department Operations

The City's governance model relies on a single data owner (the Communication Bureau) for constituent identity, while individual departments manage their own service data. Please describe:

- Role-based access controls for viewing constituent data, editing identity fields, and editing department-specific fields.
- How departments can update their own data (e.g., a request initiated through NSC or DRHS) without modifying global identity fields.
- How a central data steward can enforce data standards and validation rules across departments.
- Audit trails that capture who made a change, what changed, when it changed, and the source system or department.

This ensures zero additional administrative burden while strengthening data quality and governance.

Constituent Record Assembly Across Systems

The City needs confirmation that the CRM can assemble a unified constituent profile from multiple source systems.

Please explain:

- How data from all relevant systems (Verint, NSC - Excel, DRHS R-Central, Infor Public Sector, Constant Contact, etc.) is linked to a single constituent record.
- How the CRM tool manages complex identities, including multiple household members, multiple addresses, phone numbers, and email addresses.
- How conflicting or inconsistent data from different sources is resolved while preserving verified information.
- How the CRM presents a complete 360° view of constituent interactions-service requests, permits, complaints, program participation, and communications.
- How the system maintains a full chronological interaction history, including departmental actions, notifications, and open/closed service requests.
- How multiple service requests are associated with a single constituent record to ensure continuity and context.



City of Rochester - Constituent Relationship Management (CRM)

This supports inbound engagement (CRM → department systems) by supplying rich profiles and location context at call intake.

Workflow Automation & Service Delivery

The City needs the CRM to support service workflows across departments. Please describe:

- Your no-code or low-code workflow builder, with an illustrative example.
- How workflows route requests based on location, service type, or department.
- How departments can configure their own workflows without breaking shared, centrally governed data.
- How workflows integrate with external systems, such as Infor asset management, including available APIs.
- How the CRM issues and tracks zoning notices, including better identification via GIS and delivery confirmation.

Communications & Engagement

The City needs the CRM to support targeted, coordinated, and measurable communications. Please describe:

- Segmentation capabilities based on geography, demographics, and service history.
- How targeted communications (email, SMS, and other channels) are sent and tracked.
- How communications are logged in the constituent record.
- Event-based notifications, such as water main breaks or street closures.
- How communications integrate with Constant Contact or comparable tools.
- How the CRM supports building, distributing, and analyzing constituent surveys, including targeting a specific subsection of constituents.

Additional Critical Communication Requirements

Email Marketing Performance & Deliverability: The City requires the platform to clearly demonstrate its ability to capture and report the following, and confirmation that these metrics are complete, accurate, and easily exportable for analytics and performance measurement:

- Delivery rates
- Bounce rates
- Spam complaint rates
- Open rates
- Click-through rates
- Unsubscribe rates

Email Design & Marketing Capabilities: Please provide full clarity on the platform's capabilities related to:

- Customizable email templates
- Graphic and visual design options
- Branding and visual aesthetics
- Personalization (dynamic fields, segmentation, etc.)
- Omnichannel distribution (email, SMS, etc.)
- A/B testing
- Marketing automation (workflows that trigger automated responses)



City of Rochester - Constituent Relationship Management (CRM)

Community Engagement (Groups & Stakeholders)

Distinct from individual constituent communications, the City needs the CRM to support structured engagement with community groups, neighborhood associations, and other stakeholder organizations. Please describe:

- How the CRM maintains records for community groups and stakeholder organizations, separate from individual constituent profiles, including group membership or affiliated contacts.
- How the system facilitates communication and collaboration with these groups, such as shared updates, meeting coordination, and collection of group-level feedback.
- How engagement activity with community groups and stakeholders can be tracked and reported on separately from general constituent communications.
- How the CRM supports linking individual constituents to the community groups or organizations they are affiliated with.

Integrations & Data Infrastructure

The City needs to validate that the CRM can integrate with its broader data ecosystem. Please address:

- API capabilities, including real-time and batch options.
- How data are imported and exported (SFTP, CSV, API).
- Error handling and data validation during imports.
- How the CRM integrates with **Infor** (Public Sector and asset management), **Verint Case Management**, **Constant Contact**, and **ESRI ArcGIS (GIS)**.
- How the CRM solution integrates with **LoginRadius** (Constituent Identity and Access Management solution).
- How data flow from the CRM into the City's data lake.
- Respondents should familiarize themselves with integration capabilities of the technologies and platforms identified in this RFP and propose an approach to integration for each. Respondents should further identify any costs associated with integrating incumbent provider services.
- The City will expect the selected Respondent to work collaboratively with the City and incumbent providers in designing, testing, and implementing integrations.

Analytics & Reporting (Out of the Box)

The City needs the CRM to support performance measurement and cross-department insights. Please describe your out-of-the-box reporting for:

- Constituent engagement
- Aging Analysis: Identify stalled requests and backlog trends
- Service delivery benchmarks: Compare response time across departments and service categories
- Equity analysis

Please also address how data can be exported to the City's data lake, and how departments can build their own reports without compromising central data governance.

Security, Events, and Compliance

The City needs assurance that the CRM meets its security and compliance requirements. Please address:



City of Rochester - Constituent Relationship Management (CRM)

- How security events are logged, including failed login attempts, unauthorized access attempts, and data access logs.
- How the solution complies with data retention policies, FOIL/public records requirements, and audit requirements.
- How the solution implements role-based access control (RBAC) for CRM usage, including flexibility in setting permissions at the data-asset, field, or catalog-wide level.
- Protection mechanisms available for sensitive constituent data.
- Single Sign-on & Federation Capabilities for City staff accessing the CRM solution

Further requirements and explanations are outlined in the IT Questionnaire (Form 4).

Use-Case Scenarios

The City intends to validate how the CRM handles new constituent onboarding, identity verification, and secure account management while protecting the integrity of centralized constituent data, as well as how the CRM manages the following representative scenarios.

Scenario 1: Account Creation & Account Management

- Fake or Invalid Address Submission: Demonstrate address validation (USPS, geocoding), how the system flags unverifiable or fake addresses, and how invalid data is prevented from overwriting verified address fields.
- Fake or Invalid Phone Number Submission: Demonstrate phone number validation (format, carrier check if available), how the system handles unverifiable or disconnected numbers, and how the CRM protects verified phone numbers from being overwritten.
- New User Account Creation, Password Resets, & Account Recovery processes need to be tested against the existing LoginRadius solution and how it can integrate with a CRM solution.
 - A proposed sign-up, verification, and account recovery process can be provided in the RFP.
 - Account recovery will use elements of our existing processes for 311, NBD, and IT.
 - Full API & integration documentation is available from LoginRadius that can be provided in the RFP for vendors to use.

Scenario 2: Constituent Moves to a New Address

- Show how the system verifies the new address.
- Show how the system prevents overwriting verified data.
- Show how affected departments are notified of the change.

Scenario 3: Multiple Departments Interacting with the Same Constituent

- Demonstrate a scenario in which NSC, DRHS, and the Communications Bureau each update different fields on the same constituent record.
- Show how the CRM maintains a single, unified record throughout.
- Show how conflicting updates are resolved.
- Demonstrate how subsequent constituent interactions through another department are linked to the same constituent record without creating duplicate records.



City of Rochester - Constituent Relationship Management (CRM)

Scenario 4: Targeted Constituent Survey:

Demonstrate building and distributing a survey to a defined subsection of constituents (e.g., residents in a specific zone or program participants).

- Show how responses populate back into individual constituent records.

Scenario 5: Zoning Notice Issuance

- Demonstrate issuing a zoning notice, including automatic identification of nearby property owners via GIS.
- Show how notice delivery is logged and how proof of notice is retained.

The City of Rochester expects the selected CRM solution to address our challenges and deliver tangible benefits. We seek a vendor who can demonstrate a deep understanding of these scenarios and propose a solution that:

- Breaks down data silos and creates a single, trusted constituent record.
- Preserves centralized governance while empowering departments to operate independently.
- Builds trust in constituent data through validation, verification, and audit controls.
- Enables proactive, targeted, and equitable communication with measurable outcomes.
- Surfaces actionable insights that improve service delivery and resource allocation.
- Empowers staff and residents alike through an intuitive, accessible digital front door to City Hall.

We look forward to your creative and comprehensive proposals to help us build a strong foundation for constituent relationship management success.

3.0 Implementation Services (Form 2)

The City requests a proposal for implementation of the solution. The City expects implementation services to encompass the following areas:

- Project initiation and planning in coordination with City staff.
- Configuration, setup, and testing of the CRM Solution in coordination with City staff.
- Configuration and/or development of key data integration, data steward workflow, reporting as documented in the 'Reporting and Analytics' section of the Requirements.
- Development of required integrations and documented in the 'Integrations' section of the Requirements.
- The proposal should include training for administrators and users, including the development of City-specific documentation of system usage.
- Implementation and support stabilization support for user staff.

The City has outlined a list of specific questions to address in Form 2 - Implementation Services regarding how the implementation phase of the Project will be handled. These questions are numbered and ask for specific details to include. Failure to explicitly number your response may result in no points awarded to your response, and depending on the area, may result in disqualification for failing to meet a fundamental requirement. If your approach will address tasks concurrently, indicate this in your proposal.



4.0 Hosted Managed Services (Form 3)

The City has outlined a list of specific questions to address in Form 3 - Hosted Managed Services regarding how the hosting and managed service responsibilities of the Project will be handled. These questions are numbered and ask for specific details to include. Failure to explicitly number your response may result in no points awarded to your response, and depending on the area, may result in disqualification for failing to meet a fundamental requirement. If your approach addresses tasks concurrently, indicate this in your proposal.

5.0 IT Questionnaire (Form 4)

The City has outlined specific technical IT-related questions and requirements about your Solution in Form 4 - IT Questionnaire that cover:

- Solution Design & Support
- Solution Integrations
- Solution Cyber Security
- Solution Resilience

Please include any relevant information that you think will help the City understand how your solution will fit into our Information Technology environment. Failure to explicitly number or explain your response may result in no points awarded to your response, and depending on the area, may result in disqualification for failing to meet a fundamental requirement.

6.0 Data Requirements (Form 5)

The City's Communications Bureau and Data Office have outlined specific data governance, access, and reporting questions about your Solution in Form 5 - Data Requirements. These requirements reflect the City's need for durable, contractually enforceable access to its own constituent data, independent of the vendor relationship. Include information on your solution's ability to support:

- **SLA and Operational Reporting:** Delivery of monthly SLA reports (availability, downtime events, performance against targets, support ticket volumes, response and resolution times) and quarterly backup and recovery reports, in machine-readable form.
- **Audit Log and Security Event Access:** City access to audit logs covering authentication events, authorization decisions, City Data access events (read/write/modify/delete), administrative actions, and any access to City Data by vendor personnel or sub-processors, without an approval or request process standing between the City and its own logs.
- **Data Ownership, Access, and Export Rights:** 24x7 access to all City Data for the life of the Agreement, full export of historical and newly created City Data (including attachments, audit trails, and metadata) in machine-readable formats, at no additional cost.
- **Usage Metrics and License Compliance:** Monthly usage reporting (licensed vs. active seats, feature/module utilization, storage consumed, API volumes, inactive accounts), on-demand access to usage data, and advance notice of license overages or thresholds.



City of Rochester - Constituent Relationship Management (CRM)

- **Sub-Processor Disclosure:** A current, complete list of sub-processors with access to City Data, including the category of data accessed and whether the sub-processor performs AI/ML or automated processing on City Data, with advance notice of changes.
- **Configuration Metadata Export:** On-demand export of configuration metadata (roles, permissions, workflows, custom fields, integrations, and configuration change history) in machine-readable form.

The City has outlined a list of specific questions to address in Form 5 - Data Requirements regarding how these data access, reporting, and governance obligations will be met. These questions are numbered and ask for specific details to include. Failure to explicitly number your response may result in no points awarded to your response, and depending on the area, may result in disqualification for failing to meet a fundamental requirement. Respondents should expect these requirements to be reflected as binding contractual obligations in the resulting Agreement (see Appendix A).

7.0 Project Team (Form 6)

The City seeks proposals from qualified teams experienced in the proposed software and able to provide excellent services to implement, manage and host the solutions. The City also values partnering with firms owned by minorities and women, and firms with a diverse workforce.

To that end, please include information on the proposed project team from your organization, including the following:

- Individual project roles and responsibilities.
- Relevant education, experience, and certifications.
- Total number of team members, and the number of minorities and women on the team.

If you plan to use sub-contractors or third-party products or services to complete this Project, please include the following information:

- A description of the sub-contractor or third party.
- The roles and responsibilities assigned to the subcontractor or third party.
- The sub-contractor's qualifications and experience.
- The estimated proportion of the Project assigned to the sub-contract in dollar value.
- Indicate if the sub-contractor or third party is a minority or woman owned business.

8.0 Cost Proposal (Form 7)

8.1 Pricing Proposal Overview

The proposal must provide a detailed breakdown of charges for each service, product, and license, whether offered directly or indirectly through a third party. Include an explanation of how cost overruns will be treated in the event of targets not being met.

The cost evaluation will be divided into four separate categories:

- Licenses and Fees,
- Implementation Fees,



City of Rochester - Constituent Relationship Management (CRM)

- Managed Service Fees, and
- Integration Fees If applicable, provide multiple pricing options (i.e., enterprise, concurrent users, named users, etc.) and detail each of the options. Please be advised that implementation fees will be paid based on agreed upon Project milestones and deliverables to be determined later.

8.1.1 Agreement Term and Renewal Options

Respondents must propose an initial agreement term, along with any available renewal options. For each term and renewal period, Respondents must provide corresponding pricing, including:

- Base pricing for the initial term
- Pricing for each renewal option
- Any volume-based, usage-based, or performance-based pricing adjustments
- Identification of services or licenses that may change in cost upon renewal

Respondents should also describe any incentives, discounts, or pricing protections offered for multi-year commitments.

8.2 User Licenses and Fees

Please list every license type or individual module proposed as part of your solution, including user licenses (first- and third-party), platform license fees, transaction costs, etc. If any fees are charged at a per-quantity rate (such as per-user), please specify the metric and quantity used for the estimate. If multiple pricing options are available (such as Named Users vs. Concurrent Users), please provide both estimates in separate tables.

8.3 Implementation Fees

Any professional service quoted in the implementation fees table should be detailed in the project plan portion of the solution proposal. If any of these services are quoted for a specific amount (such as number of reports/dashboards to be developed), please specify that limit in the Scope/Limitations column.

8.4 Integration fees

As a central platform, we are looking for a solution that can interface with select City applications and tools. Please use the table in Form 7 to provide fixed-price estimates for the development of integrations with the listed applications.

For each proposed integration, Respondents should separately identify costs included in the Respondent's price and any anticipated charges for third-party products, additional licenses, or other external dependencies.

8.5 Aggregate Cost Summary

Please provide a high-level summary of your pricing proposal based on the individual sections above. If multiple fee structure options exist, enter the recommended choice in this table. The City may elect to include, exclude, or modify certain integrations or modules based on the results of the technical or pricing proposal evaluations.

9.0 Vendor Information (Form 8)

Use Form 8 - Vendor Information to provide the requested details.



City of Rochester - Constituent Relationship Management (CRM)

10.0 Proposal Submission

10.1 Timeline & Contact Information

The table below shows the preliminary RFP Schedule. Dates are subject to change. The schedule is provided, below. Any changes will be posted in an addendum on the RFP website.

Activity	Date
RFP Released	09/28/2026
Pre-Proposal Meeting (Online) (Q&A about written submission)	10/05/2026; 2:30 PM - 4:00 PM ET Meeting URL: https://teams.microsoft.com/meet/29745669466451?p=WBFD5auxBJxdfS81Su Microsoft Teams Meeting ID: 297 456 694 664 51 Passcode: eD2bm9XC (Attendance strongly recommended)
Deadline for Questions or Request for Clarification via email to RFP Contact	10/12/2026
City to Post Responses to Final Questions Online	10/16/2026
Respondent deadline to submit RFP Proposal	11/06/2026; 5:00 PM Eastern
Respondent Demo(s) (by invite only)	11/16/2026 - 11/20/2026
Final Respondent Selection	12/11/2026
Anticipated Selection Notification *	12/18/2026 - 12/22/2026

* Note: Respondents should note that project initiation is contingent upon funding availability and formal approval by the Rochester City Council, as outlined in Section 12.11.

The City may alter the timeframe as it deems necessary.

All communications by parties who have indicated an intent to submit or have submitted a proposal in response to this RFP ("Respondents"), including any questions or requests for clarifications, submission of the proposal, requests for status updates about the proposal selection process and any other inquiries whatsoever concerning this RFP shall be sent, in email, to the following City staff person ("City Contact"):

The RFP contact is:

Data Office
Mayor's Office, City of Rochester
30 Church Street



City of Rochester - Constituent Relationship Management (CRM)

Rochester, NY 14614

dataoffice@CityofRochester.gov

No contact is permitted with any other City staff member regarding this RFP during the RFP process unless specifically authorized in writing. Prohibited contact may be grounds for disqualification.

To ensure that all Respondents have a clear understanding of the scope and requirements of this RFP, the City will respond to all timely questions submitted via e-mail to the City Contact by the question deadline stated above. Questions and the responding answers will be sent via e-mail to all Respondents who have provided an e-mail address to the City Contact and will be posted on the City's webpage for this RFP. The City's failure to timely respond or provide responses to any questions shall not delay or invalidate the City's right to decide to award an agreement pursuant to this RFP.

The City will make every reasonable effort to keep Respondents informed about the RFP process. Notifications about Timeline date changes, amendments to the RFP and other information about the RFP will be sent by email to Respondents who have provided an e-mail address to the City Contact and will be posted on the City's website for this RFP. The City's failure to provide such information shall not delay or invalidate the City's right to decide to award an agreement pursuant to this RFP.

10.2 Submission Checklist

This checklist is for Respondents' use to make sure each Respondent is submitting all requirements in its proposal. Respondents do not need to include the checklist with your proposal, but please, before submitting a proposal, use the checklist to ensure that all required information is included.

All response forms and narrative response prompts can be found in the excel file attached to this RFP listing, titled "RFP Response Forms Tables Template_CRM"

Response Check List	
Item	Completed
Form 1 - Requirements	
Form 2 - Implementation Services	
Form 3 - Hosted Managed Services	
Form 4 - IT Questionnaire	
Form 5 - Data Requirements	
Form 6 - Project Team	
Form 7 - Cost Proposal	
Form 8 - Vendor Information	
30-Minute Demonstration Video link (All vendors must submit a 30-minute	



City of Rochester - Constituent Relationship Management (CRM)

recorded demonstration video supporting their RFP response)	
--	--

10.3 Proposal Guidelines

This RFP is designed to facilitate the evaluation and selection of a Respondent that is best able to achieve the City's objectives. The proposal should also meet the following formatting criteria:

- Include a table of contents that references all major sections and attachments.
- Include page numbers.
- Respond in direct and explicit reference to each numbered and lettered section of the RFP.
- If a section or requirement is not addressed, the response must include an explanation of why the Respondent is not submitting a proposal for a specific section or requirement of the RFP.
- If a table or form has been provided by the City in this RFP (see the Checklist in section 10.2 above), your response *must* include the completed form as provided/formatted. Unless specifically requested, any information provided outside the form may not be considered.
- Each proposal shall be signed by an individual authorized to enter into and execute contracts on the Respondent's behalf. Unless otherwise specified in its proposal, Respondent represents that it is capable of meeting or exceeding all requirements specified in this RFP.

Submission of a proposal shall be deemed as authorization for the City to contact Respondent's references. Evaluation of proposals will be conducted by the City based on information provided in the Respondent's proposals and on such other available information that the City determines to be relevant.

The selected Respondent may use subcontractors and other third-party providers identified in its proposals, but shall remain responsible for their performance of the resulting agreement and for coordinating the complete solution included within the awarded scope and terms of the agreement.

The Respondent selected by the City will be required to enter into a Software as a Service Professional Services Agreement (PSA) with the City (see Appendix A). The establishment of a PSA is contingent upon approval by City Council for all Agreements in excess of \$20,000 or for a period of more than one year and upon the availability of funds for such an agreement. Unless otherwise stated in the proposal, the Respondent's response to this RFP shall be deemed its acceptance of the terms of this PSA. (Note: Attention is directed to the City's Living Wage requirements and MWBE and Workforce Utilization Goals).

Respondents shall provide sufficient information in their written proposals to enable the City's review team to make a recommendation to the Mayor. The City reserves the right to invite any or all Respondents to perform a demonstration of their system. Any expenses resulting from a demonstration will be the sole responsibility of the Respondent. The City is under no obligation to select any of the responding Respondents or to conduct the Project described herein. The City may amend or withdraw the RFP at any time, within its sole discretion. The City shall have no liability for any costs incurred in preparing a proposal or responding to the City's requests with respect to the proposal.



11.0 Selection Process

11.1 Evaluation Criteria

The following is a summary of the proposal evaluation criteria. It is within the City's sole discretion to determine the value assigned to each of these criteria.

Written proposals will be scored on a 100-point scale. Forms 4 (IT Questionnaire) and 5 (Data Requirements) are evaluated separately on a pass/fail basis and are not part of the 100-point score.

Pass/Fail Requirements (Forms 4 and 5)

Form 4 - IT Questionnaire and Form 5 - Data Requirements are threshold requirements rather than scored, weighted categories. Respondents must answer all questions in Forms 4 and 5 with a "Yes" or "No," and any additional explanation or clarifying details should be provided in the Notes field.

- **Written Proposal:** The Respondent's comprehension of the needs of the City as demonstrated by its description of its approach to the elements listed in this document and attachments.
- **Cost:** The total cost of the Respondent's proposal carries significant weight in the evaluation; however, based on the evaluation of the other criteria, the City will not necessarily select the lowest proposed price.
- **30-Minute Demonstration Video:** Recorded demonstration of the software and its key functions supporting the Respondent's RFP submissions.
- **Reference Checks & Interviews (if applicable):** Evaluation of the Respondent's work for previous clients receiving similar services to those proposed in this RFP and conducting interviews with proposed implementation staff.

The City intends to award the agreement to the responsive and responsible Respondent whose proposal provides the best value to the City.

11.2 Minimum Requirements for RFP Proposals (Forms 1-8)

All proposals must include all required content as specified in the RFP Response Forms and Tables document: " RFP Response Forms Tables Template_CRM". Each section will be reviewed to ensure that the proposal's contents reflect the standards or attributes that the City considers essential to the Project's success. If Respondent's proposal does not meet the minimum requirements as specified in Form 1, it may not be considered for award.

11.3 Respondent Demonstrations

Written proposals and the required 30-minute recorded demonstration video will be reviewed for acceptability against the minimum criteria. Following this review, the City will narrow the applicant pool to a limited number of Respondents who will be invited to provide up to 4 hours of product demonstrations in multiple sessions. Demonstration scripts and schedules will be provided only to those selected vendors.

The demonstration may be conducted remotely or in person. The City's RFP Coordinator will schedule all demonstrations.



City of Rochester - Constituent Relationship Management (CRM)

The City expects selected vendors to deliver a well-organized, prepared, clear, and concise demonstration tailored to the City's scope of services. Demonstrations must allow sufficient time for questions from the evaluation team on the content presented. Demonstrations will conclude at the scheduled end time; any content not covered within the allotted time will be scored as zero / non-response.

11.4 Reference Checks and Interviews

The City may choose to conduct reference checks and include information obtained from the reference checks in the evaluation. Respondents should not depend on reference checks as an opportunity to provide additional information. All information that Respondents wish the selection team to consider during the evaluation process should be included in the written Proposal. **The City may also choose to conduct short interviews with the implementation team.**

11.5 Other Considerations

1. The City reserves the right to request additional information on any part of the Proposal, including but not limited to data migration and detailed API documentation.
2. Other criteria may be considered and evaluated by the City if it is determined to be in the best interest of the City and the success of the Project to do so.
3. Although costs are an important consideration, the decision will be based on qualifications and compliance with the requirements of this RFP and not solely on cost.
4. The City reserves the right to reject any or all proposals or to accept a proposal that does not conform to the terms set forth herein.
5. The City reserves the right to waive or modify minor irregularities in the proposals and negotiate with Consultants to serve the City's best interest.

11.6 Workforce Goals, MWBE & Rochester Presence

Workforce goals: The City of Rochester desires to encourage minority and women owned (MWBE) businesses enterprises to participate in opportunities to enter into PSAs with the City and to encourage minorities and women in the workforce. Pursuant to City Council Ordinance No. 2018-54, the City has a goal that 30% of the aggregate annual contract awards for professional service contracts over \$10,000 be awarded to minorities (M) (15%) and women (W) (15%). The City has also established minority workforce goals of 20% M and 6.9% W for professional services consulting contracts. For more information, please see <http://www.cityofrochester.gov/mwbe>.

Respondents shall be awarded **MWBE** bonus weighting as follows:

- The City will give preference to consultants who are New York State certified MWBEs. Consultants who meet this requirement will receive **an additional weighting**.
- The City will give preference to consultants who utilize state certified MWBE subcontractors with bona fide offices and operations in the Empire State Development Finger Lakes Region, which includes the following counties: Genesee, Livingston, Monroe, Ontario, Orleans, Seneca, Wayne, Wyoming, and Yates. State-certified MWBEs from outside the Region may be counted if there are insufficient businesses in the Region to perform the specialized work or consulting services required. If one or more MWBE subcontractors will perform 10% to



City of Rochester - Constituent Relationship Management (CRM)

20% of the work of the contract - measured as either a percent of the total contract amount or as a percent of the total full-time-equivalent labor hours budgeted for this project, the consultant shall receive **an additional weighting**. If MWBE subcontractors will perform more than 20% of the work of the contract, the Consultant shall receive an **additional weighting**

- Respondents shall provide sufficient documentation with their proposal to support the additional preference weighting as an MWBE Consultant or for use of MWBE subcontractors. If one or more MWBE subcontractors are proposed, they must be named, and the size of the subcontract identified. If selected, the Respondent shall submit an MWBE Utilization Plan on the City's form for approval by the MWBE Officer. Once approved, the Utilization Plan shall be incorporated into the PSA.
 - If the total amount of a PSA is increased by 5% or more at any time during the term of the PSA, the Consultant shall submit a revised MWBE Utilization Plan for approval by the MWBE Officer. The MWBE Officer may also issue a revised MWBE Utilization Plan for unforeseen changes in the availability of MWBE subcontractors during the term of the PSA.
- The City will give preference to consultants who meet or exceed the City's workforce goals, which are: 20% M and 6.9% W. Consultants who demonstrate that their and/or their subcontractors' workforce on this Project meets or exceeds these goals shall receive an **additional weighting**. If selected, the Respondent shall submit a Workforce Staffing Plan on the City's Form for review by the MWBE Officer. Once reviewed, the Workforce Staffing Plan shall be incorporated into the PSA. The calculated percentages of workforce utilization shall be based on actual hours worked and billed over the term of the project. The final determination of the workforce goals accomplished during the contract shall be based on hours reported in the workforce utilization reports.
- If selected, the Respondent shall provide MWBE utilization and subcontractor/supplier payment certification and/or workforce utilization reports on the City's forms. These reports shall be submitted with each invoice or as otherwise requested by the MWBE Officer.
- A failure to submit the required subcontractor/supplier payment certification and/or workforce utilization reports shall constitute a default in the performance of the Agreement subject to potential termination for default by the City. In addition, if the selected Respondent fails to meet the most recent MWBE Utilization Plan and/or Workforce Staffing Plan, for which additional weight was awarded by the end of the PSA, such failure may result in disqualification from award of future contracts with the City.

City of Rochester location preference: The City favors contracting firms located in the City of Rochester and a preference will be given to consultants located in the City, through an additional weighting non-local firms may wish to consider partnerships or other collaborative arrangements with local firms as a strategy to address this criterion.

12.0 Terms and Conditions

12.1 Contract Terms and Conditions

The final contract will be governed by a Professional Service Agreement (PSA), with a strong preference for a Software-as-a-Service, or SaaS agreement. The City of Rochester's standard contract template for SaaS procurements is attached as Appendix A. The City of Rochester reserves the right to reject proposals with exceptions to the contract template. Failure to note exceptions to the SaaS template may also be considered grounds to reject a proposal. If your product maintains professionally managed, high availability self-hosting capacity, we would be open to exploring pricing.



City of Rochester - Constituent Relationship Management (CRM)

Submission of the proposal shall constitute a binding offer by Respondent to provide the services at the prices described therein until such time as the parties enter into a PSA.

12.2 Responsible Vendors

The City reserves the right to determine, at its sole discretion and for any reason, if the Respondent is a responsible vendor. Findings of responsibility may be determined by current or former customer lawsuits, current bankruptcy proceedings, referral interviews or other factors which speak to the respondent's ability to provide responsible service to customers.

12.3 Acceptance of the Proposal

The City reserves the right to reject any proposal. The RFP should not be construed as a contract to purchase services, and the City shall not be obligated in any manner until a written agreement relating to an approved proposal has been duly executed.

12.4 Partial Award

The City reserves the right to award a contract for a portion of the proposed services, if doing so will serve the best interests of the City of Rochester.

12.5 Proposal Revisions

Proposal revisions must be received prior to the proposal submission/closing date and time.

12.6 Financing of Proposals

Respondent is solely responsible for all costs associated with preparing and submitting proposals. Such costs will not be borne by the City.

12.7 Acceptance of RFP Conditions

Receipt of proposal by the City will be considered acceptance of the RFP terms and conditions by the Respondent and will be incorporated into the Respondent's proposal. If the Respondent attempts to alter these terms in contract negotiation without noting specific exceptions in their proposal, the City will disqualify the Respondent and move to begin negotiations with an alternate Respondent.

12.8 Subcontracting

Subcontracting is permitted for some requested services as a condition of the anticipated contract for service. All proposed subcontractors must be listed in the proposal. If selected, the Respondent will be required to hold subcontractors to the contract terms as specified in the SaaS template.

While the City anticipates selecting a single respondent, the City reserves the right to subdivide the procurement into separate components (i.e., implementation, software-as-a-service provision, and managed services) and enter into separate agreements with each provider, if doing so will serve the best interests of the City.



City of Rochester - Constituent Relationship Management (CRM)

12.9 Warranty

Respondent represents and warrants that it is available to perform the services outlined in its proposal and furthermore that it is under no conflicting obligations that may interfere with its duties to the City because of work it may have undertaken with others if its proposal is accepted.

12.10 Negotiation Delay

If an agreement cannot be negotiated within fifteen business days of notification to the designated Respondent, the City may, in its sole discretion, terminate negotiations with that Respondent and either negotiate an agreement with another Respondent of its choice or choose to terminate the RFP process and not enter into an agreement with any of the Respondents.

12.11 Funding and Respondent Selection

The implementation of the selected proposal is dependent upon funding and Respondent selection for the work set forth in the proposal being approved by the Rochester City Council. Approval will be requested in a City Council meeting following conclusion of negotiations for the professional services agreement.

12.12 Indemnification

Respondent hereby indemnifies and holds the City of Rochester harmless for and against any and all claims, losses, damages, costs, expenses, and other actions made, sustained, brought, threatened or prosecuted in any manner based upon or arising from any communication or action by Respondent in the proposal or purported performance of the agreement herein, or claims relating to the infringement of copyrights, trademarks, trade secrets, patents, or any other confidential information or intellectual property of another.

12.13 Termination

The City may terminate this proposal at any time for any reason whatsoever and is not obligated to accept the lowest Respondent bid proposal.

12.14 Proposal Withdrawal

Prior to the proposal closing date, a submitted proposal may be withdrawn by Respondent by submitting a written request to the City contract named in the RFP. All such requests must be signed by a duly authorized representative of the Respondent.

12.15 Ownership

All documents submitted by Respondents shall become the property of the City of Rochester.

12.16 Amendments and Withdrawal

The City reserves the right to amend or withdraw this RFP in the City's sole discretion, including any timeframes or processes herein, upon notification of all Respondents as set forth above, and in such case, the City shall have no liability for any costs incurred by any Respondent.



City of Rochester - Constituent Relationship Management (CRM)

12.17 FOIL Requests

The City may request additional information from any Respondent to assist the City in making its evaluation. The proposal and all materials submitted with the proposal shall become property of the City and will be subject to NYS Freedom of Information Law. If any proprietary information is submitted with the proposal, it must be clearly identified and a request to keep such information confidential must be submitted.

12.18 CONFLICT OF INTEREST DISCLOSURE

The Consultant shall not employ as a director, officer, employee, agent, or sub-proposer an elected or appointed official or any employee of the City or any member of his or her immediate family. The Consultant has acknowledged and completed a signed disclosure form to the City, attached hereto as **Attachment B**.



City of Rochester - Constituent Relationship Management (CRM)

13.0 Appendices

Appendix A: City's Standard Software as a Service Contract Template

To be used for SaaS proposals. (Attached)



Adobe Acrobat
Document



City of Rochester - Professional Consultant Services Workforce Staffing Plan

WORKFORCE STAFFING PLAN FOR PROFESSIONAL CONSULTANT SERVICES											
PROJECT NAME:						DATE:				MINORITY GOAL	FEMALE GOAL
CONSULTANT:						AGREEMENT NUMBER:				20.00%	6.90%
CLASSIFICATION	NUMBER OF EMPLOYEES WORKING ON PROJECT									MINORITY %	FEMALE %
	TOTAL			MINORITY			NON-MINORITY				
	M	F	Non-Binary	M	F	Non-Binary	M	F	Non-Binary		
Officials, Administrators											
Professionals											
Technicians											
Sales Workers											
Office, Clerical											
Craft Workers											
Laborers											
Temporary, Apprentices											
Other (Specify)											
TOTAL WORKFORCE											
Prepared by (Signature):						Title:				Phone:	
Printed Name:						Date:				Email:	
Reviewed by MWBE Officer:									Date:		





CITY OF ROCHESTER MWBE FORM A
MWBE UTILIZATION PLAN – PROFESSIONAL CONSULTANT SERVICES

Project Name _____
Agreement # _____

Consultant _____ Total Contract Amount*
\$ _____ Original Plan ☐ Revised Plan

MWBE Business Name	M B E	W B E	Scope of Work to be Performed	Projected Start Date	Projected End Date	Total Amount of MWBE Subcontract	Percentage of Total Contract*
TOTAL:							

*Total Contract equals contract award plus all change orders

Authorized Person _____ Title _____
Phone _____

Signature _____ Date _____
Email _____

Approved by MWBE Officer _____ Date _____



City of Rochester - Constituent Relationship Management (CRM)