

September 9, 2025

Request For Proposal 26-901

Addendum #1

Please note the following changes which have been made for clarification to this Request for Proposal. **This addendum must be listed as Addendum #1 on the ACKNOWLEDGMENT OF RECEIPT OF ADDENDA/AMENDMENTS** of the bid package as verification that you have received and are aware of the information contained herein.

QUESTIONS/CLARIFICATION/CHANGES:

QUESTIONS:

1. What are the top three pain points driving the City Council's need for a CRM—tracking, reporting, constituent response times, or something else?
 - Tracking and following up on communication from constituents and internal City departments is currently left up to each team member, which leaves room for missed communication.
 - Not having a centralized knowledge database or process for frequently asked questions to streamline and standardize responses. Without a shared system, it's difficult to see who has communicated with a constituent, what was discussed, and what actions were taken. This can lead to duplicated efforts, missed follow-ups, and inconsistent messaging across the team.
 - Information is currently siloed across various platforms, such as email, spreadsheets, and departmental databases. This makes it difficult to compile a complete picture of constituent interactions and hinders efficient reporting and analysis.
2. Is the City looking for a basic CRM that improves efficiency right away, or a scalable system that can grow into broader citywide use?

The goal is to improve efficiency right away. The CRM is for the City Council Office (a separate branch of government) and is not anticipated to be used by the rest of the City (administrative departments).

3. How does the City currently categorize and prioritize constituent concerns, and should the new CRM replicate or redesign that process?

The City Council operates as a separate branch of government from City operations. The Council Office currently does not have a system for categorizing constituent concerns, beyond individualized organization methods, and prioritization is discretionary. Most individualized organization methods categorize constituent concerns based on the corresponding administrative department.

4. Since the \$20,000 cap must cover CRM licensing, implementation, and training, how does the City prioritize these components if trade-offs are necessary?

- Implementation
- Licensing
- Training

See also response to Question 5 regarding pricing.

5. If needed, would the City consider a phased implementation approach—where initial services are delivered within the \$20,000 cap, with future enhancements or expanded features planned in later years?

Yes, particularly if there are one-time costs involved in the CRM implementation. The City Council will accept bids that exceed the \$20,000 cap. In submitting proposals, please line item additional costs above \$20,000 that meet the terms of the RFP or submit alternative pricing structures.

6. Are there any anticipated opportunities for supplemental funding—such as state, federal, or grant programs—that could support the City in expanding the CRM's functionality beyond the \$20,000 annual cap?

There is no anticipated supplemental funding from outside organizations. See Response to Question 5 for more information on pricing.

7. Of the 12 anticipated users, how many will require full CRM functionality (daily constituent tracking and reporting) versus occasional or read-only access?" Please describe the daily use of the CRM by the 12 administrative support personnel to the districts, and then do the same for the 9 elected City Council officials.

Please note: We are currently in the process of hiring our thirteenth team member. Of the 13 team members, 11 are expected to be daily users of the system, while 2 may use read-only or reporting access. Daily administrative support staff would use the CRM to:

- Track constituent communications
- Generate reports to assist Councilors and the City's administrative departments
- Update contact information
- Research the history of reported issues

The 9 elected officials are more difficult to categorize, as their usage would likely vary depending on several factors, such as the intuitiveness of the system and the frequency with which they receive direct communication from constituents and how they prefer to communicate with their constituents.

8. Would the City be open to a tiered licensing model—where core staff have full CRM access, and other users (such as read-only or occasional users) have lower-cost licenses if available?

Yes

9. Are there any existing cybersecurity policies or preferred cloud hosting environments that vendors must align with (e.g., Microsoft Azure GovCloud)?

We don't have a preferred hosting environment per se but do have data requirements such as keeping our data in North American datacenters, following cyber security industry best practices, and completing annual cyber security questionnaires. Additional information can be found in the data rider provided as part of the RFP documents.

10. What's the City Council's preferred training format—live workshops, virtual training (inclusive of virtual classroom and 1:1 coaching), or on-demand materials such as pre-recorded videos and knowledge articles?

- Live workshops, including training the trainers
- Virtual training
- On-demand materials

11. How will success be measured in the first 6–12 months (e.g., reduced response time, improved reporting, constituent satisfaction)?

Councilors have better visibility into outstanding issues and follow-ups, along with the communications staff's increased ability to proactively engage with the public. The number of staff successfully engaging with the CRM daily. Time saved in researching previous issues. Positive feedback from staff and elected officials on ease of use and usefulness. Improved coordination between our office and the City's administrative departments.

12. Beyond the listed scoring criteria, are there intangibles (such as vendor's local presence, prior government work, or references) that will weigh heavily in the evaluation process?

The ability to provide a demonstration of the system and/or a trial period could play a role in the evaluation process.

13. What is their current telephone system? Do you have CTI? This information is required for me for cost calculations.

The current phone system used by the City Council is PBX-Avaya CS1000. However, we plan to transition to Microsoft Teams, with a target date of November 2025.

14. What is the budget for yearly licenses, support and maintenance services after the implementation of the solution?

At this time, the budget reflected in the RFP is the annual (yearly, recurring) budget. See Question 5 for additional pricing information.

CHANGES:

WAS: Question Deadline 9/05/25 **NOW:** Question Deadline 9/12/25

WAS: Proposal Due Date: 9/17/25 **NOW:** Proposal Due Date: 9/24/25

EXHIBIT A Price Summary Page Now Includes Additional Lines for Year 1. See Below.

EXHIBIT A
Price Sheet Summary

Respondent's Legal Name: _____
(Must be Respondent's company name as reflected on its organizational documents, filed with the state in which Respondent is organized)

Please present a Fee Schedule for each year's services:

Year 1:	\$ _____	Annual Fees
1A	\$ _____	Implementation
1B	\$ _____	Training
1C	\$ _____	Licensing
Year 2:	\$ _____	Annual Fees
Year 3:	\$ _____	Annual Fees
Year 4:	\$ _____	Annual Fees
Year 5:	\$ _____	Annual Fees
5-YEAR TOTAL		\$ _____

Request for Proposal

26-901

Professional Services for:
Constituent Relationship Management Software

Department: City Council

NIGP Commodity Code(s): 208-68, 208-37, 209-38

RFP Schedule

EVENT	DATE
RFP Issue Date	08/12/2025
Pre-Proposal Conference <i>Virtual – email buyer for invitation</i>	Thursday, August 28, 2025 1:30PM – 3:00PM
Deadline for Questions <i>Submit to assigned buyer via email.</i>	09/12/2025 <i>10 Days prior to RFP due date</i>
Proposal Due Date <i>Mail or deliver to City Clerk address. Proposals are open the day after the due date.</i>	09/24/2025

If You have any questions or need additional information, contact the Assigned Buyer:

Donny Tiemann | dtiemann@cityoftulsa.org

*All questions should be emailed with **RFP 26-901** in the subject line.*

Submit proposals (sealed) to:

Office of the City Clerk
City of Tulsa
175 E. 2ND St.
Suite 260
Tulsa, OK 74103



I. OVERVIEW AND GOALS:

With this Request for Proposal (RFP), we are searching to secure professional services from qualified Sellers to provide a comprehensive constituent relationship management (CRM) software. The CRM will support the City Council's efforts in improving constituent services. The CRM should help assign, prioritize, track, monitor, and analyze constituent and internal department concerns, requests, and feedback while offering a centralized platform for communication between residents and the City Council.

We enthusiastically look forward to receiving your proposal.

II. BACKGROUND:

The City of Tulsa is a full-service municipal corporation that serves 413,066 citizens. Tulsa is the second largest city in the state of Oklahoma and principal municipality of the Tulsa metro area. The City's mission is to build the foundation for economic prosperity, improved health and enhanced quality of life for our community to be a globally competitive, world-class city.

Three elected branches make up Tulsa's city government: the Mayor, the City Council and the City Auditor. The Mayor serves as chief administrator and manages the day-to-day operations of the City. The legislative functions of Tulsa government are performed by the City Council. The City Auditor serves as an independent eye on City operations and resources. All City's operational departments, such as Public Works, Animal Services and Planning and Neighborhoods, among others, report to the Mayor.

The City Council is comprised of nine nonpartisan members (councilors) elected for two-year terms by the citizens in each of Tulsa's nine Council Districts. The legislative functions of the City Council include adopting municipal laws and policies, approving the City's annual budget and appropriate City funds, listening to the concerns and suggestions of citizens and evaluating the overall effectiveness of City operations. City Councilors are assisted in their duties by dedicated civil service staff who support the priorities and daily activities of the City Council. The City Council Staff facilitates constituent inquiries to City departments and monitors and reports back on the status.

Currently, the City Council Department operates without a CRM system, which has led to challenges in tracking and managing constituent interactions. This proposal seeks to address those issues. Interactions with constituents are via web form, email (centralized and individual email accounts), postal mail, phone call, social media, mobile device (texts to personal devices) or by visiting in-person.

III. TIMELINE:

The schedule below provides estimated dates for the RFP and contracting process.

The City of Tulsa may adjust this schedule as needed.

EVENT	DATE
RFP Issue Date	08/12/2025
Pre-Proposal Conference	08/28/2025
Deadline for Questions	09/12/2025
PROPOSAL DUE DATE	09/24/2025
Begin proposal evaluations	09/26/2025
Interviews with Respondents (anticipated)	10/07/2025
Negotiations with apparent successful Respondent begin (anticipated)	10/17/2025
Execute contract (anticipated)	10/29/2025
Begin service delivery (anticipated)	11/03/2025

IV. SCOPE OF WORK:

The selected Seller shall provide a comprehensive Constituent Relationship Management (CRM) software solution tailored to the needs of the Tulsa City Council. The solution should improve constituent services by streamlining communication, tracking inquiries, prioritizing tasks, and analyzing interactions between the City Council, internal departments, and the residents of Tulsa.

The Respondent shall:

- A. Provide a project team that works closely with the Tulsa City Council to understand current workflows and needs of the Tulsa City Council.
- B. Implement a cloud-based CRM system that enables centralized tracking, monitoring, and reporting of constituent inquiries and requests for 1-25 users
- C. Ensure the system integrates with existing city communication channels.
- D. Provide secure user authentication and role-based access control to ensure data privacy and security.
- E. Offer robust search and filtering functionalities to facilitate easy access to historical records of constituent interactions.
- F. Enable case management and workflow automation for monitoring the resolution process of constituent requests.
- G. Provide analytics and reporting tools to generate insights into constituent concerns and trends.
- H. Offer mobile accessibility to allow councilors and staff to access and update information remotely.
- I. Deliver training, documentation, and ongoing technical support to ensure system adoption and continuous improvement

Additional details and specifics below:

A. System Features

- 1. The CRM must centralize all constituent interactions (MS Outlook emails, scanned mail, phone, social media, web forms, walk-ins) into a single database for easy tracking.
- 2. Allow case management with automated tracking, response reminders, and resolution timelines.
- 3. Users should be able to assign inquiries to specific staff members and monitor progress.
- 4. The system should categorize and prioritize constituent concerns and have a robust search and filtering function.
- 5. Provide the ability to upload and attach documents (Word, PDF, Excel, images, etc.) to specific cases.
- 6. Ability to provide a means of alerting users of duplicate names, addresses, businesses etc. at data entry and ability to merge duplicate records as needed.
- 7. Creation of email messages and/or push messages (text/SMS) to be sent through CRM.
- 8. The CRM should provide real-time, easy to read dashboards showing pending vs. resolved constituent requests and trends in constituent concerns (e.g., public safety, infrastructure, city services).
- 9. The system should allow custom report generation.
- 10. Predictive analytics to identify emerging community concerns based on historical data.
- 11. Provide the ability to filter and export all or some data without a complex administrative request process and lead time for custom reports.
- 12. Generation of maps and reports that show the locations and frequency of reported issues.

B. Integration Capabilities

1. CRM must integrate with City of Tulsa's existing communication channels, including Microsoft Outlook, social media, Wix web forms and future Teams phone system.
2. Full access to mobile and cloud-based devices across multiple platforms (*e.g.*, iOS/Android mobile devices and Windows and Mac) for councilors and staff to use remotely.
3. The system should be able to import historical data found in Excel, Wix and Outlook.
4. The system must allow emails to be sent and received using our own domain.

C. User Training & Support

1. The system is easy to learn and use.
2. The Seller must provide comprehensive training, including but not limited to providing on-demand training materials (videos, user guides, FAQs).
3. Ongoing technical support during normal business hours (8:00 AM to 5:00 PM Central Standard Time, Monday through Friday).
4. Dedicated account manager to escalate issues that may arise.
5. Feedback and optimization reviews to ensure adoption and continuous improvement.

D. Performance & Security

1. System uptime must be 99.9% or higher, with redundancy to prevent outages.
2. Regular software updates and security patches should be provided without service disruption.
3. Adherence to local, state, and federal regulations on public data handling, including the Oklahoma Open Records Act.
4. Role-based access control ensuring councilors, staff, and administrators only see relevant data.
5. Must have a process and format for us to extract all data if we decide to terminate our subscription.

V. DELIVERABLES:

The products, reports, and plans to be delivered to the City will include:

- A. A detailed plan for deployment, including data migration, system integration, testing, training, go-live, etc.
- B. A fully operational CRM system that meets the outlined requirements.
- C. Comprehensive training materials and documentation. In-person or virtual live training as part of the implementation.
- D. Ongoing technical support to help solve issues with the software as they arise.

VI. PERFORMANCE METRICS AND CONTRACT MANAGEMENT:

Performance Metrics

The City will develop performance metrics with the awarded Respondent. These performance metrics will highlight key priorities that will be analyzed with the awarded Respondent collaboratively during the life of the contract. The City looks forward to working with the awarded Respondent to define these important performance metrics during contract negotiations.

The final set of performance metrics and frequency of collection will be negotiated by the City and the awarded Respondent prior to the finalization of an agreement between parties and may be adjusted over time as needed.

Performance Metric	Data Source	Data Collection Frequency	Data Collection Responsibility

Contract Performance Monitoring

As part of the City of Tulsa's commitment to becoming more outcomes-oriented, we seek to actively and regularly collaborate with awarded Respondents to enhance contract management, improve results, and adjust service delivery based on learning what works. Reliable and relevant data is necessary to drive service improvements, ensure compliance, inform trends to be monitored, and evaluate results and performance. During the regular meetings that occur throughout the term of the contract, it is anticipated that the following topics will be regularly discussed:

- Current status of performance metrics
- Topics of interest or concern to the Respondent
- Discussion and troubleshooting of challenges
- Review of activities on the horizon
- Review of budget and spending this year-to-date
-

VII. INSTRUCTIONS FOR SUBMITTING A PROPOSAL:

- A.** Proposals must be received by **5:00 p.m. on Wednesday, September 24, 2025, Central Daylight Time**. Please place proposals in a sealed envelope or box clearly labeled **"RFP 26-901, Constituent Relationship Management Software"**.

Proposals received late will be returned unopened.

- B.** Interested Respondents should submit:
One (1) unbound original and three (3) bound copies of the proposal plus one (1) digital copy (compact disc or USB drive).

- C.** Proposals shall be delivered and sealed to:

Deputy City Clerk
City of Tulsa
175 E. 2nd St.
Suite 260
Tulsa, OK 74103

- D.** All interested Respondents (Sellers) are required to register with the Buyer in order to receive updates, addenda or any additional information required. You can learn more about the registration process on the following website:
<https://www.cityoftulsa.org/government/departments/finance/selling-to-the-city/register-as-a-vendor/>.

The City is not responsible for any failure to register.

- E.** Inquiries or questions to the Buyer requesting clarification regarding the Request for Proposal must be made via e-mail and must be received prior to the end of the business day on **Friday, September 12, 2025**.

Donny Tiemann, Project Buyer
dtiemann@cityoftulsa.org

Any questions regarding this RFP will be handled as promptly and as directly as possible. If a question requires only minor clarification of instructions or specifications, it will be handled via e-mail. If any question results in a substantive change or addition to the RFP, the change or addition will be forwarded to all registered Respondents as quickly as possible by addendum.

- F.** Proposals will be opened on the morning after the due date, at 8:30am, at the:

Standards, Specifications, and Awards Committee Meeting
175 East 2nd Street, 2nd Floor
City Council Chamber

VIII. RESPONSE QUESTIONS AND PROPOSAL REQUIREMENTS

To be considered, interested Respondents should submit or address the following questions or information requests:

- A. Describe the features and reporting capabilities of your software.
- B. How does it align with our requirements?
- C. Is a knowledge base included in the software?
- D. Does the system have the capability to use predictive canned responses or prewritten email templates?
- E. Can email distribution lists be stored and updated on the system?
- F. Provide a sample(s) of a standard report.
- G. Can reports be easily exported? If so, describe how reports are exported.
- H. With which mobile and operating systems does your software have full compatibility? (e.g., iOS/Android mobile devices and Windows and Mac)
- I. Does the system integrate with Wix web forms, email marketing, etc.?
- J. How long is a typical installation after signing a contract?
- K. Describe the process and timeline for a new implementation.
- L. Describe the features that make your system intuitive and easy to learn.
- M. What is the average learning curve for everyday users?
- N. How is training provided?
- O. What is the training process for people helping to implement the tool?
- P. Will the City of Tulsa receive a dedicated support manager?
- Q. How does your organization provide technical support?
- R. Describe your pricing structure. Is it based on the number of licenses or some other format? Please provide an example.
- S. Are there any add-on costs? If so, please provide a list of the costs.
- T. Does the organization allow testing or a trial period? If so, at what point does it begin, how long does it last?
- U. Briefly describe your experience in providing CRM software to public agencies.

- V. How long have you been in business?
- W. What differentiates your product compared to your competitors' products?
- X. Please provide three (3) client references for projects that your organization has completed similar to the City's current RFP.

References

1. Organization: _____
Address: _____
Contact Person: _____ Phone Number: _____
Date of Services: _____
Description/Scope of Services: _____

2. Organization: _____
Address: _____
Contact Person: _____ Phone Number: _____
Date of Services: _____
Description/Scope of Services: _____

3. Organization: _____
Address: _____
Contact Person: _____ Phone Number: _____
Date of Services: _____
Description/Scope of Services: _____

IX. EVALUATION OF PROPOSALS:

The approval of the selected Respondent will be subject to the final determination of the City and will be contingent on the successful completion of a contract between the City and the selected Respondent(s).

All Bids will be evaluated using the following criteria:

Category	Total Points	What Would a Top Score Look Like?
<i>System Features</i>	30	The Respondent meets or exceeds all features and reporting requirements.
<i>Integration</i>	20	The Respondent offers seamless integration with existing systems and demonstrates flexibility in adapting the software to unforeseen requirements that may arise post-implementation.
<i>Support & Implementation</i>	15	The Respondent's software provides an intuitive user interface. Their plan for implementation is clear and detailed, training is comprehensive and demonstrates strong ongoing support
<i>Pricing</i>	10	The Respondent's proposal stays within the approved budget, not to exceed \$20,000 for the year.
<i>Experience & Qualifications</i>	20	The Respondent has proven experience of working with government agencies, especially legislative branches departments, (similar in size and scope) where they have successfully implemented CRM software with demonstrated benefits. The Respondent has a strong understanding of public sector requirements.
<i>Quality of Response</i>	5	The Respondent's proposal is well organized with clear, thorough and complete responses.

Commented [DS1]: Have we thought about directions for the scoring rubric. Why does something get a 30, etc?

The City of Tulsa also reserves the right to evaluate based on the full list of eligible criteria listed in [Title 6, Chapter 4](#) of the Tulsa Revised Ordinances (TRO):
https://library.municode.com/ok/tulsa/codes/code_of_ordinances.

X. MISCELLANEOUS

- A. The City expects to enter into a written Agreement (the "Agreement") with the chosen Respondent(s) that shall incorporate this RFP and your proposal. Further, Respondent(s) will be bound to comply with the provisions set forth in this RFP. In addition to any terms and conditions included in this RFP, the City may include in the Agreement other terms and conditions as deemed necessary. Your response to this RFP will be considered part of the Agreement if one is awarded to you.
- B. All data included in this RFP, as well as any attachments, are proprietary to the City.
- C. The City notifies all possible Respondents that no person shall be excluded from participation in, denied any benefits of, or otherwise discriminated against in connection with the award and performance of any contract on the basis of race, religious creed, color, national origin, ancestry, physical disability, sex, age, ethnicity, or on any other basis prohibited by law.
- D. All Respondents shall comply with all applicable laws regarding equal employment opportunity and nondiscrimination. They shall also comply with the Americans with Disabilities Act (ADA).
- E. The use of the City's name in any way as a potential customer or contractual partner is strictly prohibited except as authorized in writing by the City.
- F. The City assumes no responsibility or liability for any costs you may incur in responding to this RFP, including attending meetings or contract negotiations.
- G. The City is bound to comply with Oklahoma's Open Records Act, and information submitted with your proposal, with few exceptions, is a matter of public record. For specifics on the Oklahoma Open Records Act, see the link here: <https://libraries.ok.gov/law-legislative-reference/library-laws/statutes-open-records/>.

The City shall not be under any obligation to return any materials submitted in response to this RFP request.

- H. The City shall not infringe upon any intellectual property right of any Respondent but reserves the right to use any concept or methods contained in the proposal. Any desired restrictions on the use of information contained in the proposal should be clearly stated. Responses containing your proprietary data shall be safeguarded with the same degree of protection as the City's own proprietary data. All such proprietary data contained in your proposal must be clearly identified.
- I. The City also notifies all Respondents that the City has the right to modify the RFP and the requirements herein, to request modified proposals from Respondents, and to negotiate with the selected Respondent on price and other contract terms, as necessary to meet the City's Objectives.
- J. **Payment.** Invoices should be e-mailed to the City of Tulsa – Accounts Payable at: apinvoices@cityoftulsa.org. Payment will be made net 30 days after receipt of a properly submitted invoice or the City's Acceptance of the Supplies or Services, whichever is later. Each invoice must be fully itemized, identifying Supplies provided and/or Services performed, and must bear the purchase order number assigned by the City.

The purchase order number shall appear on all invoices, packing lists, packages, shipping notices, instruction manuals and other written documents relating to the Supplies or Services. Packing lists shall be enclosed in each and every box or package shipped pursuant to this Agreement, indicating the content therein.

- K. **Insurance.** The selected Respondent "Seller" and its subcontractors must obtain at Seller's expense and keep in effect so long as City is purchasing Supplies or Services from Seller pursuant to this Bid, policies of insurance in the minimum amounts set forth below and Workers' Compensation and Employer's Liability insurance in the statutory limits required by law.

General Liability: personal injury and property damage, each occurrence	\$1,000,000.00
Auto Liability, each occurrence	\$1,000,000.00
Workers' Compensation	(Statutory limits)

Seller's insurer must be authorized to transact business in the State of Oklahoma. Seller will have 10 Days after notification that its Bid was Accepted by the City to provide proof of coverage

Seller shall not cause any required insurance policy to be cancelled nor permit it to lapse. Failure of the Seller to comply with the insurance requirements may be deemed a breach of the contract.

- L. **Data Rider:** If the box is checked "Yes," the Data Rider is **required**. See Exhibit B.

Yes: ☒ No: ☐

RESPONDENT INFORMATION SHEET

Respondent's Legal Name: _____
(Must be Respondent's company name as reflected on its organizational documents, filed with the state in which Respondent is organized)

State of Organization: _____

Respondent's Type of Legal Entity: (check one)

- | | |
|--|--|
| ☐ Sole Proprietorship | ☐ Limited Partnership |
| ☐ Partnership | ☐ Limited Liability Partnership |
| ☐ Corporation | ☐ Limited Liability Limited Partnership |
| ☐ Limited Liability Company | ☐ Other: _____ |

Respondent's Address: _____
Street City State Zip Code

Respondent's Website Address: _____

Sales Contact:

Name: _____

Title/Position: _____

Street: _____

City: _____

State: _____

Phone: _____

Email: _____

Contact for Legal Notice:

Name: _____

Title/Position: _____

Street: _____

City: _____

State: _____

Phone: _____

Email: _____

How did you learn about this business opportunity with the City of Tulsa?

- ☐ Email from Assigned Buyer
- ☐ City of Tulsa Website
- ☐ Tulsa World posting
- ☐ Purchasing search engine
- ☐ Industry colleague
- ☐ Other: Click or tap here to enter text.

EXHIBIT A
Price Sheet Summary

Respondent's Legal Name: _____
(Must be Respondent's company name as reflected on its organizational documents, filed with the state in which Respondent is organized)

Please present a Fee Schedule for each year's services:

Year 1: \$ _____ Annual Fees
 1A \$ _____ Implementation
 1B \$ _____ Training
 1C \$ _____ Licensing
Year 2: \$ _____ Annual Fees
Year 3: \$ _____ Annual Fees
Year 4: \$ _____ Annual Fees
Year 5: \$ _____ Annual Fees

5-YEAR TOTAL	\$ _____
---------------------	-----------------

By signing here, I affirm that these prices are my formal offer and agree to the inclusion of City of Tulsa's general contract terms and conditions as listed in Appendix A in any contract with the City of Tulsa.

Company Name: _____ Date: _____

Signature: _____

Name Printed: _____

Title: _____

EXHIBIT B DATA RIDER

REQUIREMENTS FOR THE PROTECTION OF THE CITY OF TULSA'S PROTECTED DATA

This "Rider" is added to and incorporated as part of the Agreement pursuant to TAC 577H, between the City of Tulsa

("City") and _____ ("Seller").
(Seller's Legal Name)

Capitalized terms not defined in this Rider shall have the meaning provided in the Agreement. In the event of a conflict between the terms of this Rider and the Agreement, the terms of this Rider shall govern.

1. Acknowledgement of Confidential Nature of Information, Access and Applicable Law

Seller acknowledges that all data provided to Seller under the Agreement is confidential ("Protected Data"), and may be subject to certain state and federal laws restricting use and disclosure of such data, including the Oklahoma Security Breach Notification Act; the Oklahoma Government Website Information Act (Section 3113.1); the Oklahoma Computer Crimes Act; the CJIS Security Policy; the privacy and information security aspects of the Health Insurance Portability and Accountability Act and its implementing regulations (including without limitation 45 CFR Part 160 and Subparts A, C, and E of Part 164); and America's Water Infrastructure Act Section 2013. Seller agrees to comply, and require subcontractors to comply, with all applicable federal and state laws restricting the access, use and disclosure of Protected Data.

2. Prohibition on Unauthorized Use or Disclosure of Protected Data

Seller agrees to hold the City's Protected Data, and any information derived from such information, in strictest confidence. Seller shall not access, use or disclose Protected Data except as permitted or required by the Agreement or as otherwise authorized in writing by the City, or applicable laws. If required by a court of competent jurisdiction or an administrative body to disclose Protected Data, Seller will notify City in writing immediately upon receiving notice of such requirement and prior to any such disclosure, to give City an opportunity to oppose or otherwise respond to such disclosure (unless prohibited by law from doing so). If such opposition is unsuccessful, or if the City does not otherwise oppose or respond to the disclosure notice, Seller shall provide to the City a copy of any Protected Data disclosed contemporaneously with its disclosure. Any transmission, transportation or storage of Protected Data outside the United States is prohibited except on prior written authorization by the City.

Notwithstanding any other provisions of the Agreement, this Section B does not prohibit or limit Seller from any use or disclosure of any information that may be the same as any Protected Data but which Seller can demonstrate by documentary evidence was (i) properly obtained by Seller without access to, reference to or use of any Protected Data, and (ii) at all times maintained separately from and not in any way combined, commingled, compared, benchmarked or in any way associated with any Protected Data.

3. Safeguard Standard

With respect to the City's Protected Data, Seller shall comply in all respects reasonably pertinent to the Agreement with the Fair Information Practice Principles, as defined by the U.S. Federal Trade Commission. If collecting Protected Data electronically from individuals on behalf of the City, Seller shall utilize a privacy statement or notice in conformance with such principles.

Seller agrees to protect the privacy and security of Protected Data according to all applicable laws and regulations, by industry standard & commercially-acceptable standards, and no less rigorously than it protects its own confidential information, and will not place City, whether by act or omission, in violation of any privacy or security law known by Seller to be applicable to City. Seller shall implement, maintain and use appropriate administrative, technical and physical security measures to preserve the confidentiality (authorized access), integrity and availability of the Protected Data. While Seller has responsibility for the Protected Data under the terms of this Agreement, Seller shall ensure that such security measures are regularly reviewed and revised to address evolving threats and vulnerabilities.

- A. All facilities used to store and process Protected Data will employ commercial best practices, including appropriate administrative, physical, and technical safeguards, to secure such data from unauthorized access, disclosure, alteration, and use. Such measures will be no less protective than those used to secure Seller's own data of a similar type, and in no event less than reasonable in view of the type and nature of the data involved. Seller will not use or maintain any Protected Data on a laptop, hard drive, USB key, flash drive, removable memory card, smartphone, or other portable device or unit except only as approved by City and provided that immediately upon the need for such Protected Data ceasing, such Personal Data is immediately destroyed or erased.
- B. At the request of the City, Seller will provide evidence that it has established and maintains technical and organizational security measures governing the processing of Protected Data appropriate to the processing and the nature of the Protected Data to be protected. In order to validate technical and organizational security measures, Seller will cooperate with the City's Seller Due Diligence Program, which includes a risk assessment, potentially supported by a questionnaire and/or a SOC 2 Type 2 (or equivalent) review, depending on risk level. In the event that the due diligence process results in recommended controls, Seller will implement agreed-upon controls in order to reduce residual risk to acceptable levels. Seller will promptly correct any deficiencies in the technical and organizational security measures identified by City to Seller.
- C. Without limiting the foregoing, Seller warrants that all Protected Data will be encrypted in transmission (including via web interface) and remain encrypted at rest at no less than 256bit level encryption.
- D. Seller will use industry standard and up-to-date security tools and technologies such as antivirus protections and Seller will not create or maintain data which are derivative of Protected Data except for the purpose of performing its obligations under the Agreement and this Rider and as authorized by City.
- E. intrusion detection methods in providing Services under this Agreement.

- F. Seller will not store or process Protected Data outside of data centers located in the United States unless authorized to do so in writing by City and such store or process complies with the applicable state, federal and international data protection laws, the Agreement and this Rider. City may revoke its authorization at any time.
- G. Seller will not permit any officer, director, employee, agent, other representative, subsidiary, affiliate, independent contractor, or any other person or entity acting on behalf of Seller to process Protected Data unless such processing is in compliance with the Agreement and this Rider and is necessary in order to carry out Seller's obligations under the Agreement and this Rider;
- H. Seller will establish a nightly process to provide the City with a full and updated copy of the Protected Data collected and stored on behalf of the City.
- I. Seller will provide the City with a complete data dictionary document including, but not limited to: Table Names, Field Names, Field Types, Field Lengths, and Table Relationships which shall not be disclosed to any persons without a need to know. All materials provided should note the confidentiality of such information.
- J. Seller will keep and maintain access logs, firewall logs, intrusion protection logs for a minimum of 180 days.

4. Return or Destruction of Protected Data

Within 30 days of the expiration or earlier termination of the Agreement, or when there is no longer any legitimate business need (as determined by City) to retain such Protected Data, or otherwise on the instruction of City, Seller shall return the Protected Data to City in a format determined by City, unless the City requests in writing that such data be destroyed. This provision shall also apply to all Protected Data that is in the possession of subcontractors or agents of Seller. Such destruction shall be accomplished by "purging" or "physical destruction" in accordance with commercially reasonable standards for the type of data being destroyed (e.g., Guidelines for Media Sanitization, NIST SP 800-88). Seller shall certify in writing to the City that such return or destruction has been completed.

5. Sole Property of City

Protected Data will at all times remain the sole property of City, and nothing in this Rider will be interpreted as granting Seller any license or other right under any patent, copyright, trademark, trade secret, or other proprietary right to the Protected Data.

6. Breaches of Protected Data

For purposes of this section, the term "Breach," has the meaning given to it under the applicable state, federal law.

- A. Reporting of Breach.** Immediately upon discovery of a confirmed or suspected Breach, Seller shall report both orally and in writing to the City. In no event shall the report be made more than 24 hours after Seller knows or reasonably suspects a Breach has or may have occurred. In the event of a suspected Breach, Seller shall keep the City informed regularly of the progress of its investigation until the uncertainty is resolved.

Seller's report shall identify:

- 1. The nature of the unauthorized access, use or disclosure,
- 2. The Protected Data accessed, used or disclosed,
- 3. The person(s) who accessed, used and disclosed and/or received Protected or Private Information (if known),
- 4. What Seller has done or will do to mitigate any deleterious effect of the unauthorized access, use or disclosure, and
- 5. What corrective action Seller has taken or will take to prevent future unauthorized access, use or disclosure.
- 6. Seller shall provide such other information, including a written report, as reasonably requested by City.

- B. Coordination of Breach Response Activities.** In the event of a Breach, Seller will:

- 1. Immediately notify the State of Oklahoma and CISA upon learning of a possible breach.
- 2. Immediately preserve any potential forensic evidence relating to the Breach;
- 3. Promptly (within 2 business days) designate a contact person to whom the City will direct inquiries, and who will communicate Seller responses to City inquiries;
- 4. As rapidly as circumstances permit, apply appropriate resources to remedy the breach condition, investigate, document, restore City service(s) as directed by the City, and undertake appropriate response activities;
- 5. Provide status reports to the City on Breach response activities, either on a daily basis or a frequency approved by the City;
- 6. Coordinate all media, law enforcement, or other Breach notifications with the City in advance of such notification(s), unless expressly prohibited by law;
- 7. Make all reasonable efforts to assist and cooperate with the City in its Breach response efforts; and
- 8. Ensure that knowledgeable Seller staff are available on short notice, if needed, to participate in City-initiated meetings and/or conference calls regarding the Breach.

- C. Costs Arising from Breach.** In the event of a Breach by the Seller or its staff or subcontractors, Seller agrees to promptly reimburse all costs to the City arising from such Breach, including but not limited to costs of notification of individuals, establishing and operating call center(s), credit monitoring and/or identity restoration services, time of City personnel responding to Breach, civil or criminal

penalties levied against the City, attorney's fees, court costs, etc. Any Breach may be grounds for immediate termination of this Agreement by the City. Nothing in this paragraph limits any other remedies available to City.

- D. Indemnify.** Seller shall indemnify, defend and hold City harmless from and against all losses suffered or sustained by the City, and its employees, officers, representatives, or contractors, or by any third party or entity, caused by, resulting from, or attributable to Seller's breach or violation of any of the terms and conditions of this Rider. Seller's obligation to indemnify, defend, and hold City harmless shall survive termination or expiration of this Rider.

7. Examination of Records

City shall have access to and the right to examine any pertinent books, documents, papers, and records of Seller involving transactions and work related to this agreement until the expiration of five years after final payment hereunder. Seller shall retain project records for a period of five years from the date of final payment.

8. Assistance in Litigation or Administrative Proceedings

Seller shall make itself and any employees, subcontractors, or agents assisting Seller in the performance of its obligations under the Agreement available to City at no cost to City to testify as witnesses in the event of an unauthorized disclosure caused by Seller that results in litigation or administrative proceedings against City, its directors, officers, agents or employees based upon a claimed violation of laws relating to security, privacy or arising out of this agreement.

9. Insurance

Seller will maintain at all times during the term of this Agreement, at its own expense, cyber liability insurance with limits of no less than \$1,000,000.00 for any one occurrence and \$5,000,000.00 in annual aggregate.

10. Survival

Seller shall maintain an industry standard disaster recovery program to reduce the potential effect of outages because of supporting data center outages. Any backup site used to store City Protected Data shall include the same information security and privacy controls as the primary data center(s).

11. Right to Audit

Seller agrees that, as required by applicable state and federal law, auditors from state, federal, the City, or other agencies so designated by the City, shall have the option to audit the outsourced service. Records pertaining to the service shall be made available to auditors and the City during normal working hours for this purpose.

For Seller

By: _____
Signature

Name: _____

Title: _____

Date: _____

AFFIDAVIT

NON-COLLUSION, INTEREST, AND CLAIMANT

STATE OF _____)
COUNTY OF _____)ss.

I, _____, of lawful age, being first duly sworn, state that:
(Seller's Authorized Agent)

1. I am the Authorized Agent of Seller herein for the purposes of certifying facts pertaining to the existence of collusion between and among Bidders and municipal officials or employees, as well as facts pertaining to the giving or offering of things of value to government personnel in return for special consideration in the letting of any contract pursuant to the proposal to which this statement is attached.
2. I am fully aware of the facts and circumstances surrounding the making of Seller's Bid to which this statement is attached, and I have been personally and directly involved in the proceedings leading to the submission of such Bid; and
3. Neither the Seller nor anyone subject to the Seller's direction or control has been a party:
 - a. to any collusion among Bidders in restraint of freedom of competition by agreement to respond at a fixed price or to refrain from responding,
 - b. to any collusion with any municipal official or employee as to quantity, quality, or price in the prospective contract, or as to any other terms of such prospective contract, nor
 - c. in any discussions between Bidders and any municipal official concerning exchange of money or other thing of value for special consideration in the letting of a contract.
4. No officer or employee of the City of Tulsa either directly or indirectly owns a five percent (5%) interest or more in the Bidders business or such a percentage that constitutes a controlling interest. Affiant further states that the following officers and/or employees of the City of Tulsa own an interest in the Bidders business, which is less than a controlling interest, either direct or indirect.
5. All invoices to be submitted pursuant to this agreement with the City of Tulsa will be true and correct.
6. That the work, services or material furnished will be completed or supplied in accordance with the plans, specifications, orders, requests or contract furnished or executed by the affiant. Affiant further states that (s)he has made no payment directly or indirectly to any elected official, officer or employee of the City of Tulsa, or of any public trust where the City of Tulsa is a beneficiary, of money or any other thing of value to obtain payment of the invoice or procure the contract or purchase order pursuant to which an invoice is submitted. Affiant further certifies that (s)he has complied with all applicable laws regarding equal employment opportunity.

By: _____

Title: _____
Signature

Subscribed and sworn to before me this _____ day of _____, 20____.

Notary Public

My Commission Expires: _____

Notary Commission Number: _____

The Affidavit must be signed by an authorized agent and notarized

ACKNOWLEDGMENT OF RECEIPT OF ADDENDA/AMENDMENTS

I hereby acknowledge receipt of the following addenda or amendments and understand that such addenda or amendments are incorporated into the Proposal and will become a part of any resulting contract.

List Date and Title/Number of all addenda or amendments: (Write "None" if applicable).

Sign Here ► _____

Printed Name: _____

Title: _____

Date: _____

THE REST OF THIS PAGE LEFT INTENTIONALLY BLANK

APPENDIX A – City of Tulsa General Contract Terms

It is anticipated that the City of Tulsa will enter into an Agreement with the selected Respondent (“Seller”) for an initial term ending one (1) year from the date of its execution by the City’s Mayor, with four (4) one-year renewals available at the option of the City. Contracts entered into by the City of Tulsa generally include, but are not limited to, the following terms:

1. **Renewals.** Seller understands and acknowledges that any future contracts or renewals are neither automatic nor implied by this Agreement. The continuing purchase by City of the Services set forth in this Agreement is subject to City’s needs and to City’s annual appropriation of sufficient funds in City’s fiscal year (July 1st to June 30th) in which such Services are purchased. In the event City does not appropriate or budget sufficient funds to perform this Agreement, this Agreement shall be null and void without further action by City.
2. **No Indemnification or Arbitration by City.** Seller understands and acknowledges that City is a municipal corporation that is funded by its taxpayers to operate for the benefit of its citizens. Accordingly, and pursuant to Oklahoma law, City shall not indemnify nor hold Seller harmless for loss, damage, expense or liability arising from or related to this Agreement, including any attorneys’ fees and costs. In addition, Seller shall not limit its liability to City for actual loss or direct damages for any claim based on a breach of this Agreement and the documents incorporated herein. City reserves the right to pursue all legal and equitable remedies to which it may be entitled. City will not agree to binding arbitration of any disputes.
3. **Intellectual Property Indemnification by Seller.** Seller agrees to indemnify, defend, and save harmless City and its officers, employees and agents from all suits and actions of every nature brought against them due to the use of patented, trademarked or copyright-protected appliances, products, materials or processes provided by Seller hereunder. Seller shall pay all royalties and charges incident to such patents, trademarks or copyrights.
4. **General Liability and Indemnification.** Seller shall hold City harmless from any loss, damage or claims arising from or related to the performance of the Agreement herein. Seller must exercise all reasonable and customary precaution to prevent any harm or loss to all persons and property related to this Agreement. Seller agrees to indemnify and hold the City harmless from all claims, demands, causes of action or suits of whatever nature arising out of the services, labor, and material furnished by Seller or Seller’s subcontractors under the scope of this Agreement.
5. **Liens.** Pursuant to City’s Charter (Art. XII, §5), no lien of any kind shall exist against any property of City.
6. **No Confidentiality.** Seller understands and acknowledges that City is subject to the Oklahoma Open Records Act (51 O.S. §24A.1 *et seq.*) and therefore cannot assure the confidentiality of contract terms or other information provided by Seller pursuant to this Agreement that would be inconsistent with City’s compliance with its statutory requirements there under.
7. **Compliance with Laws.** Seller shall be responsible for complying with all applicable federal, state and local laws. Seller is responsible for any costs of such compliance. Seller shall take the necessary actions to ensure its operations in performance of this contract and employment practices are in compliance with the requirements of the Americans with Disabilities Act. Seller certifies that it and all of its subcontractors to be used in the performance of this agreement are in compliance with 25 O.S. Sec. 1313 and participate in the Status Verification System. The Status Verification System is defined in 25 O.S. Sec. 1313 and includes, but is not limited to, the free Employee Verification Program (E-Verify) available at www.dhs.gov/E-Verify.
8. **Right to Audit.** The parties agree that books, records, documents, accounting procedures, practices, price lists or any other items related to the Services provided hereunder are subject to

inspection, examination, and copying by City or its designees. Seller shall retain all records related to this Agreement for the duration of the contract term and a period of three years following completion and/or termination of the contract. If an audit, litigation, or other action involving such records begins before the end of the three year period, the records shall be maintained for three years from the date that all issues arising out of the action are resolved or until the end of the three year retention period, whichever is later.

9. **Governing Law and Venue.** This Agreement is executed in and shall be governed by and construed in accordance with the laws of the State of Oklahoma without regard to its choice of law principles, which shall be the forum for any lawsuits arising under this Agreement or incident thereto. The parties stipulate that venue is proper in a court of competent jurisdiction in Tulsa County, Oklahoma and each party waives any objection to such venue.
10. **No Waiver.** A waiver of any breach of any provision of this Agreement shall not constitute or operate as a waiver of any other provision, nor shall any failure to enforce any provision hereof operate as a waiver of the enforcement of such provision or any other provision.
11. **Entire Agreement/No Assignment.** This Agreement and any documents incorporated herein constitute the entire agreement of the parties and supersede any and all prior agreements, oral or otherwise, relating to the subject matter of this Agreement. This Agreement may only be modified or amended in writing and signed by both parties. Notwithstanding anything to the contrary herein, the City does not agree to the terms of any future agreements, revisions or modifications that may be required under this Agreement unless such terms, revisions or modifications have been reduced to writing and signed by both parties. Seller may not assign this Agreement or use subcontractors to provide the Goods and/or Services without City's prior written consent. Seller shall not be entitled to any claim for extras of any kind or nature.
12. **Equal Employment Opportunity.** Seller shall comply with all applicable laws regarding equal employment opportunity and nondiscrimination.

RESPONDENT CHECKLIST

Use this checklist to ensure You have properly read and completed all documents listed below. This document (the RFP) contains all the following materials, which must be completed and returned to the City of Tulsa Clerk's Office. We recommend You include this checklist with Your proposal.

Proposer's Name: _____

RESPONDENT CHECKLIST	
RESPONDENT DOCUMENTS	INCLUDED?
Cover Letter	
Proposal Narrative (To Include Requirements as listed on page 3-9)	
Respondent Information Sheet (Required Form)	
Price Sheet Summary (Required Form)	
Data Rider (Required Form)	
Affidavit (Non-Collusion, Interest & Claimant) (Required Form)	
Acknowledgement of Receipt of Addenda (Required Form)	
Additional Information (Optional)	

Please Return Entire RFP Packet

PACKING LABEL

FROM: [Name]

[Respondent's legal name]

[Street Address]

[City, State, Zip Code]

City of Tulsa - City Clerk's Office

175 East 2nd Street, Suite 260

Tulsa, OK, 74103

Respondent Submission For:

RFP# 26-901

RFP DESCRIPTION: Constituent Relationship Management Software

This label ensures that Your proposal will be sent to the correct office (City Clerk's) and that it is associated with the correct Solicitation (indicated by the RFP number). Proposals must be sealed and either mailed or delivered to the City Clerk's Office. Proposals must also be received no later than 5:00 PM (CST) on date listed on the first page of the RFP.