

To: Kelvin Lewis
Peggy Joyner
Chatham County

From: Tom Maureau
Amber Daughtry
Winbourne Consulting, LLC

Date: March 4, 2020

Subject: Chatham County CAD/RMS RFP Project – Evaluation and Scoring Process

Chatham County Purchasing and Contracting Department and CAD/RMS Project Rules

- CAD/RMS RFP # 20-0018-1 published February 13, 2020
- All personnel will adhere to Chatham County Purchasing and Contracting Department rules
 - No contact with any CAD/RMS company regarding the CAD/RMS project and the RFP process
 - Questions from CAD/RMS companies must be directed to Chatham County Purchasing and Contracting Department Director Peggy Joyner
- All Project Team personnel will be cognizant of State of Georgia Public Records Laws and email communication
- Fair and objective process
 - No comments about favorites, front runners or “never going to win”
 - Decision should be based on factual data obtained in the RFP process
- Chatham County Confidentiality Agreement – All personnel participating the evaluation and scoring process need to sign

Number of RFP Responses

- As stated in the memorandum from the County Manager, we have no idea how many CAD/RMS companies will respond to the RFP
- As articulated in the memo, it can cost a CAD/RMS company up to \$50,000 to participate in the entire process
- CAD/RMS companies evaluate numerous factors to make a decision to respond or not
- We use four responses in our Evaluation and Scoring Plan as good middle of the road placeholder

RFP Q & A Process and Amendments

- Responding companies have been encouraged to ask as many questions as necessary – The better they understand what Chatham County is seeking, the better quality the RFP response
- Q & A period ends April 3, 2020

- Our goal is to publish a response to questions received each week
 - Amendment #1 was published on February 21, 2020
- The Chatham County Purchasing and Contracting Department is responsible for publishing the amendments
- A formal process has been established

CAD/RMS RFP Response Process

1. All questions will be directed to Chatham County Purchasing and Contracting Department
2. All questions will be numbered in sequential order. This will allow us to reference a previous question and answer when applicable
3. Questions related to Chatham County Purchasing and Contracting Department rules
 - a. To be answered by Peggy Joyner
 - b. Peggy will send the answers to Kelvin, Tom and Amber prior to publishing to ensure everyone is in-sync
4. Questions related to RFP content
 - a. Peggy will send the questions to Kelvin, Tom and Amber as soon as possible
 - b. Within 24-hours, Tom and Amber will provide direction and any relevant information to Kelvin
 - c. Assignment of questions
 - i. Some questions may be easy for Kelvin, Tom and Amber to answer and may not require stakeholder input at this point
 - ii. Questions that need stakeholder input will be assigned to the appropriate personnel with a due date/time
 - iii. Each group chair is responsible for ensuring all stakeholders in the group are informed and have the ability to provide input
 - iv. Personnel will provide their input to Kelvin, Tom and Amber who will formulate the final response
 - d. All questions and answers will be compiled onto a single document and socialized with the team prior to publishing. Personnel will be provided a due date/time for any input
5. Kelvin has responsibility to obtain County executive management approval for any question/response that changes the original scope of the CAD/RMS RFP
6. Peggy will publish the amendment with an RFP amendment number
 - a. Note: Recommend including the previous amendments on each new amendment so the companies will always have one-stop shopping for all questions and answers to date
7. Kelvin will ensure all CAD/RMS team members have access to the published amendments

CAD/RMS RFP High Level Project Schedule

The Proposal due date was originally April 2, 2020. Multiple requests for an extension were received. New due date is April 16, 2020.

ACTIVITY	DATE
RFP Release Date	February 13, 2020
Question and Answer Period	February 14 – April 3, 2020 5:00pm EST
RFP Closing Date	April 16, 2020 5:00pm EST
Phase I - Evaluation and Scoring of Proposals	April 20 – May 26, 2020 – Dependent on decisions made today
Phase 1 Ranking	May 26, 2020
Phase 2 Notification to Selected Proposers	May 27, 2020
Preparation for Phase 2 Scripted Demonstration and Presentations	May 27 – June 26, 2020
Phase 2 Proposer Demonstrations	June 29 – July 24, 2020
Phase 2 – Evaluation and Scoring/Final Ranking	July 27 – 31, 2020
Contract negotiations	TBD
Final contract approval	TBD

Concept of Operations – CAD/RMS Evaluation and Scoring Process

- No single person on a CAD/RMS Evaluation Committee is a subject matter expert (SME) regarding every stakeholder area
 - Police Communications and Operations
 - Fire/Rescue Communications and Operations
 - Law Enforcement investigations and Field Based Reports
 - Fire/Rescue Field Based Reports
 - Emergency Medical Patient Care Reports
 - IT – Infrastructure, redundancy, networks, interfaces, data conversion
 - GIS/Mapping
- Subject matter expertise is required for every nuanced area within a stakeholder group
 - Police Communications
 - Public Safety Answer Point (PSAP) systems – 9-1-1, CAD, mapping, mobile, log & recording/Instant Playback, radio, etc.
 - Police PSAP workflows, business processes, policies, procedures and training protocols
 - Police PSAP positions - Call Taking, Dispatching, Supervisor, specialty positions
 - Police PSAP best practices, standards and guidelines – APCO, NENA, IACP, PERF, CALEA
 - Police PSAP data requirements – Executive management to end-users

- Police Operations
 - Allocation and deployment of law enforcement personnel
 - Police operations workflows, business processes, policies, procedures and training protocols
 - Police Operations positions – Command, management, field supervisor, officer and specialty positions
 - Police Operations best practices, standards and guidelines – APCO, NENA, IACP, PERF, CALEA
 - Police Operations data requirements – Executive management to end-users
- Fire/Rescue Communications
 - Public Safety Answer Point (PSAP) systems – 9-1-1, CAD, mapping, mobile, log & recording/Instant Playback, radio, etc.
 - Fire/Rescue PSAP workflows, business processes, policies, procedures and training protocols
 - Fire/Rescue PSAP positions - Call Taking, Dispatching, Supervisor, specialty positions
 - Fire/Rescue PSAP best practices, standards and guidelines – APCO, NENA, NFPA, IAFC, NAEMT, NAEMSP, NASEMSD
 - Fire/Rescue PSAP data requirements – Executive management to end-users
- Fire/EMS Operations
 - Allocation and deployment of Fire/EMS personnel
 - Complex Fire/EMS response plans to ensure the appropriate concentration and compliment of resources are assigned to a specific type of incident
 - Fire/EMS operations workflows, business processes, policies, procedures and training protocols
 - Fire/EMS operations positions – Command, management, field supervisor, officer and specialty positions
 - Fire/EMS operations best practices, standards and guidelines – APCO, NENA, NFPA, IAFC, NAEMT, NAEMSP, NASEMSD
 - Fire/EMS operations data requirements – Executive management to end-users
- Information Technology
 - Data Center – Infrastructure, servers, racks, electrical/UPS, HVAC
 - Networks – LAN/WAN, wired and wireless
 - Hardware and software specifications – Servers, workstations, Mobile Data Computers
 - System Dependability, resiliency, reliability
 - System performance
 - Redundancy, failover and Continuity of Operations (COOP)

- Disaster Recovery
- Interfaces – 9-1-1, L & R, CAD-to-CAD
- Data Conversion
- System interoperability
- Cyber security
- Maintenance and support
- GIS/Mapping
 - NENA standards for 9-1-1/PSAP operations
 - AVL/Closest Unit Routing – Street network
 - Police operations
 - Fire/Rescue operations
 - Emergency Management operations
 - Business Intelligence system

A critical success factor is to ensure the CAD/RMS Evaluation and Scoring Committee receives accurate, objective and relevant input from a diverse group of subject matter experts prior to scoring each proposal. To do otherwise adds both significant and unnecessary risk for project failure. For example:

- The Law Enforcement Committee member should not be scoring a CAD/RMS proposal regarding Fire/EMS Communications, Fire/EMS Operations, IT and GIS without appropriate SME input
- The Fire/Rescue Operations Committee member should not be scoring a CAD/RMS proposal regarding Police Communications, Police Operations, IT and GIS without appropriate SME input
- The IT Committee member should not be scoring a CAD/RMS proposal regarding Police & Fire/EMS Communications, Police & Fire/EMS operations, GIS without appropriate SME input
- Etc.

CAD/RMS Project Team SMEs

- The CAD/RMS Project Team has a group of SMEs assigned for all major stakeholder areas:
 - Chatham County Communications Services
 - Law Enforcement
 - Fire/Rescue
 - EMS
 - IT
 - GIS
- All assigned SMEs possess the required level of knowledge, skills, abilities and experience
- Each SME group has the appropriate number of personnel to successfully complete the assignment

- A core number of SME for each group must be established to ensure consistency of operations
- Other SMEs may be included in addition to the core SMEs

Evaluation and Scoring Criteria

- Precise evaluation and scoring criteria will be developed by the Evaluation and Scoring Committee and Project Team
- The scoring criteria will use a template methodology which will ensure consistency throughout the entire process (e.g., every team member is on the same sheet of music regarding instructions, rules and communication)

Proposal Review Process

- The Chatham County Purchasing and Contracting Department will validate the received CAD/RMS system proposals
- The proposals will be evaluated in alphabetical order
- The CAD/RMS Project Manager will assign a proposal to the Evaluation Committee and SME Team one proposal at a time. The objective is to have discussions about a specific proposal prior to transitioning to another proposal
- No personnel will be allowed to start a new proposal until all work has been completed on the active proposal
- The CAD/RMS Project Manager will ensure every section of a proposal has been properly assigned for review
- All personnel will provide input regarding enterprise-wide topics - Company Experience, Project Management, Support and Company Roadmap sections
- The SME teams will be responsible for evaluating all sections in each proposal that are relevant to their area of expertise and experience
- The Evaluation Committee and SME Teams will create initial draft scores and notes that are subject to change as the process progresses forward
- Proposals should first be evaluated in a stand-alone manner and then a comparative analysis
- When a proposal has been evaluated, personnel should review previous draft scores and notes for any potential modifications
- The SME teams will discuss their findings and document their findings and recommendations in the form of a SWOT analysis (e.g., slide deck template)
 - Strengths
 - Weaknesses
 - Opportunities
 - Threats (e.g., risks and costs)
- All personnel can review every section of each proposal and provide any necessary input
- The same reference questions will be used for all reference checks
 - Reference check process will start with a survey
 - Follow-up contact by select personnel may be required

- When all SME teams have completed their assignment for a proposal, each team will present their SWOT analysis using the exact same methodology to the Evaluation Committee
- There is no expectation that SME committee members will obtain 100% consensus on every topic. The Evaluation and Scoring Committee will be presented with all perspectives in there is disagreement
- The Evaluation Committee may ask questions to SME committee members
- Once all input has been received, the Evaluation and Scoring Committee can make draft scores for the proposal being evaluated
- At the conclusion of receiving input for all validated proposals, the Evaluation and Scoring Committee will document official scores for each proposal

CAD/RMS System Scoring Categories

The RFP Scoring Categories are:

• Functionality and Features	25 points
• Technical/IT	21 points
• Company	9 points
• Project Management	8 points
• References	5 points
• MWBE	15 points
• <u>Cost</u>	<u>17 points</u>
Total	100 points

Scoring Category Definitions

- To ensure everyone is operating from the same game plan, formal definitions will be developed for each scoring category
- All scoring categories will be broken down into sub-categories

Functionality and Features

- All applications and proposed system functionality, features and capabilities that have a relationship to public safety operations - CAD, Mobile, Mapping, LRMS, FRMS, Business Intelligence/Analytics
- Focus is on Public Safety Operations
 - Police, Fire and EMS Emergency Communications Center operations
 - Police, Fire and EMS operations
 - Integrated CAD/RMS functionality
- Business Intelligence
 - Ability of the proposed CAD/RMS system to produce dashboards, reports
 - Real time, cyclical, base-line to advanced analytics
 - Produce various types of reports – graphical, statistical, mapping

Technical/IT

- Architecture of the proposed system for:
 - Dependability, resiliency, reliability
 - System performance
 - Redundancy, failover and Continuity of Operations (COOP)
 - Disaster Recovery
 - Interfaces
 - Data Conversion
 - System interoperability

Company Public Safety Experience

- Years and experience in the CAD/RMS industry
- Customers employing the company's CAD/RMS system
 - Nationwide
 - Of similar size or larger than Chatham County
- Company stability (e.g., Dunn and Bradstreet)

Project Management

- Project Plan and schedule
- All phases – Design, installation, configuration, interfaces, data conversion, training, cutover and support

References

- Respondents shall provide Chatham County reference contact information. Chatham County may also contact other personnel at reference agencies including:
 - Executive management
 - Project management
 - IT
 - Public Safety Answering Point/Emergency Communications Center
 - Law Enforcement
 - Fire/EMS
 - Records Management
 - Criminal Investigation Division
 - Patrol
 - Crime Analysis
 - Other areas

MWBE

- Chatham County MWBE Director completes this scoring
 - Disadvantaged Firm Involvement
 - Commitment in the level of local MWBE firms, subcontractors, consultants and employees
 - Approach to meeting and exceeding the MWBE requirements
 - History of Minority-owned, Women-owned business utilization
 - Narrative describing past accomplishment in this area
 - Proposers may also provide their company's employee demographic information regarding their company's commitment to equal opportunity

Cost Proposal

- Cost Proposal Team will complete this scoring
 - Clarity of Price Proposal information
 - Core system
 - Options
 - Initial and annual recurring
 - Hardware
 - Software
 - Other
 - Support/maintenance and warranty
 - Extended contract
- Note: We recommend some dialog between the Cost Proposal Team and the CAD/RMS Evaluation Committee due to the complexity of the price proposals. CAD/RMS companies employ a multifaceted pricing model making it difficult to achieve a 100% apples-to-apples comparison between companies

Multi-Phase Evaluation and Scoring Process

The evaluation and scoring of the CAD/RMS proposals will occur in three distinct phases:

Phase 1 – Proposal Evaluation

- Evaluation and scoring of the CAD/RMS proposal information
- All scoring categories will be scored including the Cost Proposal
- The conclusion of this phase will provide the initial Phase 1 ranking
- The Evaluation and Scoring Committee and SME committees will then determine if the top two or three companies will be invited to Phase 2

Phase 2 – Scripted Demonstration Process

- The top two or three companies will be provided with precise instructions and data to demonstrate their proposed CAD/RMS system. Information includes:
 - Scripted scenarios
 - Multi-agency
 - Police
 - Fire/EMS
 - Complex incidents (e.g., MCI, active shooter)
 - Police, Fire and EMS data
 - CAD, status and disposition codes
 - Apparatus and unit numbers
 - Districts/Zones and response areas
 - Etc.
 - Business Intelligence/Analytics
 - Ability to query the system and generate dashboards and reports
 - Chatham County GIS data for all scenario locations
- Presentation instructions
 - Technical presentation
 - GIS presentation
- Each company will be provided the exact same schedule to complete Phase 2
- The Phase II demonstration process may take five business days to complete. A precise schedule and agenda will be presented to the selected participants
- Participants will be expected to utilize sample Chatham County public safety data for the demonstration
- Participants shall demonstrate the system they proposed in their RFP response
- Participants shall advise Chatham County if there is any difference between the proposed system and what is being demonstrated
- The order of the company demonstrations will be selected at random and/or depending upon company availability
- Each company will be provided with a detailed list of scripted scenarios that will be used in the demonstration process

Day 1

- Brief presentation about the company
- A-Z overview of proposed CAD/RMS system
- NG9-1-1 capabilities and roadmap
- Q & A

Day 2

- CAD/Mobile/Mapping
- 9-1-1 call taking through dispatch scenarios
- Multi-agency scenarios
- Law Enforcement scenarios
- Q & A

Day 3

- CAD/Mobile/Mapping
- Fire/Rescue scenarios
- EMS scenarios
- MCI/Disaster scenarios
- Q & A

Day 4 - RMS

- Law Enforcement RMS
- Fire RMS
- EMS RMS

Day 5

- Technical/IT presentation
- Infrastructure, specifications, reliability, back-up process and redundancy
- Interfaces, Data conversion, legacy data solution
- Final Q & A

Important Factors

- Evaluation and Scoring Committee members and Core SME committee members must attend each demonstration to obtain consistency of operation and adhere to Chatham County Purchasing and Contracting Department rules
- Following the completion of each demonstration, there will be a one week break to allow SME personnel to meet and discuss their draft findings
- SME committees will then provide input to the Evaluation and Scoring Committee using the exact same SWOT methodology as Phase 1
- At the conclusion of all demonstrations, the Evaluation and Scoring Committee will complete the Phase 2 scoring based for two categories only - Functionality and Technical

- Phase 1 scores for these two categories are re-scored

Best and Final Offer (BAFO)

- The County will provide a Best and Final Offer (BAFO) opportunity in Phase 2
- The BAFO is 100% voluntary. If a company does not participate in the BAFO, the Cost Proposal score from Phase 1 is used
- Companies that participate in the BAFO must clearly show all changes to the Cost Proposal
- The Cost Proposal Committee will re-score the cost category (17 points)
- The final cost proposal score is added to the Phase 2 score to achieve the final ranking

CAD/RMS Project Charter Agreement

- Chatham County Purchasing and Contracting Department has final approval authority over the Evaluation and Scoring process
- The final scores will be presented to the RRC and EAB
- The CAD/RMS Project Manager, Kelvin Lewis, will be responsible for managing the RFP evaluation process, schedule and tasks
- Winbourne Consulting will assist in the facilitation of the evaluation and scoring process and provide subject matter expert input as needed
- Winbourne Consulting will not score any proposals
- Winbourne Consulting will not influence the Project Team one way or another regarding a specific CAD/RMS company
- All stakeholders understand the objective is to select the best overall system that provides the best value to the citizens and Chatham County Public Safety
 - No one jurisdiction or department is more important than another
 - No discipline is more important than another (e.g., 9-1-1, Law enforcement, Fire, EMS, IT and GIS)
- All stakeholders agree to adhere to the established Evaluation and Scoring process
- Departments will assign the appropriate subject matter experts to the various teams
- All Project Team members will follow professional decorum regarding meeting discussions
- Project Team personnel will attempt to resolve all questions and issues at the lowest level prior to escalation
- The Evaluation and Scoring Committee will follow the scoring recommendations from the various groups and must provide a business case to the entire Chatham County Project Team if they decide to not follow any recommendation

CAD/RMS Evaluation and Scoring Committee

- The Evaluation and Scoring Committee will be responsible for the official scoring of all proposals
- To ensure all stakeholders groups are represented on the Evaluation and Scoring Committee, membership will be comprised of:

CAD/RMS Scoring Committee

Section	Name
Chatham County Communications Services	Diane Pinckney
Law Enforcement	Robert Gavin
Fire/Rescue	Elzie Kitchens
EMS	Phil Koster
IT	Nick Batey
GIS	Laura Hall

Cost Proposal Committee

Section	Name
Assistant County Manager	Linda Cramer
Chatham County Finance	Amy Davis
Chatham County Purchasing and Contracting Department	Peggy Joyner
City of Savannah Project Manager	Daphne Williams
Savannah Police Department	Assistant Chief Stephanie Price
Pooler Financial Director	Chris Lightle
Chatham County IT	Nick Batey

Chatham County Communications Services SME Committee

Name	Representing

Law Enforcement SME Committee

Name	Representing

Fire/EMS SME Committee

Name	Representing

IT/Technical SME Committee

Name	Representing

GIS SME Committee

Name	Representing

Chatham County Strategic Objectives (From RFP)

The CAD/RMS Project is designed to replace the various CAD/RMS software suites used by Chatham County Public Safety Departments. Chatham County is seeking a modern Commercial Off the Shelf (COTS) system to replace the existing CAD and RMS systems. County objectives of the CAD/RMS Project include:

- Commercial Off the Shelf (COTS) integrated solution for Chatham County Public Safety departments that are end users of the CAD/RMS
- Cost effective solution that will provide the best Return on Investment (ROI)
- System Integrator ownership for all solutions (e.g., a single help desk number for support and services for all proposed applications)

The project will provide the foundational platform to meet or exceed widely accepted, contemporary public safety administrative, operational, and technical objectives, including:

- Operate at Maximum Operational Effectiveness and Time Efficiency
- Improved safety for Public Safety personnel and citizens
- Improve the quality of 9-1-1/Communications, Fire, EMS, Law Enforcement & Emergency Management work products
- Improve Response Times/Performance Metrics
- Provide objective, accurate, timely, relevant and precise information for actionable decision making
- Analyze and improve the deployment of personnel and resources
- Enhance employee productivity and capabilities
- Improved ability to make data driven decisions
- Improve information management
- Identify crime and workload trends and patterns
- Capable of valid and reliable analytics, statistical analysis, and data mining
- Improve internal and external customer satisfaction
- Measure the effectiveness of strategies and tactics in a timelier manner
- Eliminate redundant and repetitive action
- Enhance personnel and equipment request justification
- Provide a dependable, reliable and high-performing CAD/RMS system for public safety consistent with applicable public safety industry technical standards
- Improve information management
- Improve internal and external customer satisfaction
- Improve internal and external operational and administrative communication
- Measure the effectiveness of strategies and tactics in a timelier manner
- Analyze and improve the deployment of personnel and resources
- Enhance employee productivity and capabilities
- Reduce redundant and repetitive action

- Provide a dependable, reliable and high-performing CAD/RMS system for public safety consistent with applicable public safety industry technical standards

Proposers shall provide information explaining how the proposed solution will meet or exceed the above goals and objectives. Additionally, it is the desire of Chatham County to leverage the experience and expertise of the CAD/RMS industry and is open to any recommendations and/or options that could improve Public Safety services in a cost-effective manner.

Phase 2 Scripted Demonstration Scenarios

- Scripted scenarios will be developed after scoring criteria has been completed
- Personnel should develop scoring criteria with potential scenarios in mind
- Adjustments will be made to the scoring criteria once the scenarios have been developed to ensure everything is aligned

Proposal Evaluation Schedule

Start Date	Due Date	Task	Completed
03/02/20		Evaluation and Scoring process	
03/20/20		Breakdown of all scoring categories	
		Scripted demonstration scenarios	
		Reference Check questions	
		Final scoring criteria	
	04/16/20	CAD/RMS Proposals due	
	04/17/20	Proposal validation process	
04/20/20		Initial assessment and discussion of Company #1	Time Frame for each proposal – 1 week?
		Company #1 Reference Check process	
		Initial assessment and discussion of Company #2	
		Company #2 Reference Check process	
		Initial assessment and discussion of Company #3	
		Company #3 Reference Check process	
		Initial assessment and discussion of Company #4	
		Company #4 Reference Check process	
		Evaluation and Scoring Committee and SME committees comparative analysis. SME groups prepare SWOT presentations	
		Start SME committee SWOT presentations to the Evaluation and Scoring Committee	
		Phase 1 scoring (first 83%)	

		Cost Proposal score. Add all score together	
		Evaluation and Scoring Committee Phase 1 scoring – Initial ranking. Determine if two or three vendors will be invited to the scripted demonstration process	
		Notify scripted demonstration companies and schedule accordingly. Allow four weeks for companies to prepare	
		Complete scripted scenarios and data to send to the top 2/3 companies	
		Start Best and Final Offer (BAFO) Process	
		Scripted Demonstration #1	
		Scripted Demonstration #2	
		Scripted Demonstration #3 (if applicable)	
		SME committee input. Evaluation Team re-score	
		BAFO Cost re-score	
		Final Evaluation and Scoring Committee Score- Final ranking	
		Notify companies of final ranking	
		Contract negotiation process. Contract signed	