

# **SANTA FE COUNTY**

## **REQUEST FOR PROPOSALS (RFP)**



### **ONLINE CHAT AND CHATBOT SERVICES**

**RFP NO. 2023-0023-AO/APS**

**NM Commodity Code(s): 91895 and 92034**

**September 2022**

## TABLE OF CONTENTS

	PAGE NO.
I. ADVERTISEMENT .....	4
II. INTRODUCTION .....	5
A. PURPOSE OF THIS REQUEST FOR PROPOSAL .....	5
B. SCOPE OF WORK .....	5
C. INSURANCE REQUIREMENTS .....	6
D. PROCUREMENT SPECIALIST .....	6
E. DEFINITION OF TERMINOLOGY .....	7
III. CONDITIONS GOVERNING THE PROCUREMENT .....	9
A. SEQUENCE OF EVENTS .....	9
B. EXPLANATION OF EVENTS .....	10
1. Issuance of RFP .....	10
2. Pre-Proposal Conference .....	10
3. Acknowledgement of Receipt Form Due .....	10
4. Deadline to Submit Additional Written Questions .....	10
5. Response to Written Questions .....	10
6. Submission of Proposals .....	11
7. Proposal Evaluation .....	11
8. Selection of Finalists .....	11
9. Best and Final Offers from Finalists (If applicable) .....	12
10. Oral Presentations by Finalists (If applicable) .....	12
11. Contract Negotiations .....	12
12. Contract Award .....	12
13. Right to Protest .....	12
C. GENERAL REQUIREMENTS .....	13
1. Acceptance of Conditions Governing the Procurement .....	13
2. Incurring Cost .....	13
3. Prime Contractor Responsibility .....	13
4. Subcontractors .....	13
5. Amended Proposals .....	13
6. Offerors' Rights to Withdraw Proposal .....	13
7. Proposal Offer Firm .....	14
8. Disclosure of Proposed Contents .....	14
9. No Obligation .....	14
10. Termination .....	14
11. Sufficient Appropriation .....	15
12. Legal Review .....	15
13. Governing Law .....	15

14.	Basis for Proposal .....	15
15.	Contract Terms and Conditions .....	15
16.	Contract Deviations .....	15
17.	Offeror Qualifications.....	15
18.	Right to Waive Minor Irregularities .....	16
19.	Change in Contractor Representatives.....	16
20.	Notice.....	16
21.	County Rights .....	16
22.	Right to Publish .....	16
23.	Ownership of Proposals .....	16
24.	Electronic Mail Address Recommended .....	16
25.	Preference in Procurement by Santa Fe County .....	17
26.	Double-Sided Documents.....	18
27.	Living Wage .....	18
IV.	RESPONSE FORMAT AND ORGANIZATION .....	19
A.	NUMBER OF RESPONSES.....	19
B.	NUMBER OF COPIES .....	19
C.	PROPOSAL FORMAT .....	19
1.	Proposal Organization .....	19
2.	Letter of Transmittal.....	20
V.	SPECIFICATIONS .....	21
A.	INFORMATION .....	21
1.	Time Frame .....	21
B.	EVALUATION CRITERIA .....	21
1.	Introduction .....	21
2.	Technical Competence and Specialized Experience.....	21
3.	Evidence of Understanding Scope of Work.....	21
4.	Capacity and Capability .....	22
C.	COST PROPOSAL.....	22
VI.	EVALUATION OF PROPOSALS .....	23
A.	EVALUATION SCORING.....	23
B.	EVALUATION PROCESS .....	23
APPENDICES		
A.	Acknowledgement of Receipt Form.....	25
B.	Campaign Contribution Disclosure Form.....	26
C.	Resident Veterans Preference Certification .....	29
D.	Cost Proposal.....	32
E.	Questions .....	33
E.	Sample Agreement .....	38

## I. ADVERTISEMENT

### SANTA FE COUNTY ONLINE LIVE AND CHATBOT SERVICES RFP NO. 2023-0023-AO/APS

Santa Fe County requests proposals from qualified vendors or firms to provide Online Live and Chatbot Services. All proposals submitted shall be valid for ninety (90) days subject to action by the County. Santa Fe County reserves the right to reject any and all proposals in part or in whole. A completed proposal shall be submitted in a sealed container indicating the proposal title and number along with the Offeror's name and address clearly marked on the outside of the container. All proposals must be received by **2:00PM on Thursday, October 13, 2022, at the Santa Fe County Purchasing Division, 102 Grant Avenue, (First Floor), Santa Fe, NM 87501.** To combat the spread of the recent COVID-19 illness, the submission of Proposals **will also be accepted electronically** utilizing a DropBox. Please utilize this link to upload your proposal submission. <https://www.dropbox.com/request/H08JXyBhWxOTH90JFyZZ>.

By submitting a proposal for the requested services each Offeror is certifying that it is a qualified firm and its proposal complies with the requirements stated within the Request for Proposals.

**A Pre-Proposal Conference** will be held at **11:00AM on Tuesday, September 20, 2022 online via WebEx using link provided or by calling (480) 418-9388 meeting number 2490 763 2811. Attendance is not mandatory but highly recommended.**  
<https://sfco.webex.com/sfco/j.php?MTID=m98795a7b5f1191d044c28a4a1d70f958>

**EQUAL EMPLOYMENT OPPORTUNITY:** All qualified Offerors will receive consideration of contract(s) without regard to race, color, religion, sex or national origin, ancestry, age, physical and mental handicap, serious medical condition, disability, spousal affiliation, sexual orientation or gender identity.

Request for Proposals will be available by contacting Amanda Patterson-Sanchez, Procurement Specialist Senior, 102 Grant Avenue, (First Floor) Santa Fe, New Mexico 87501, or by telephone at (505) 992-6753 , or by email at [apatterson-sanchez@santafecountynm.gov](mailto:apatterson-sanchez@santafecountynm.gov) or on our website at [http://www.santafecountynm.gov/asd/current\\_bid\\_solicitations](http://www.santafecountynm.gov/asd/current_bid_solicitations).

**PROPOSALS RECEIVED AFTER THE DATE AND TIME SPECIFIED ABOVE WILL NOT BE CONSIDERED AND WILL BE REJECTED BY SANTA FE COUNTY.**

Santa Fe County  
Published September 11 & 12, 2022

## II. INTRODUCTION

### A. PURPOSE OF THIS REQUEST FOR PROPOSAL

Santa Fe County invites interested parties to submit proposals for an online live and chatbot services for various departments within Santa Fe County, in order to provide a more accessible and transparent government service to the public. Santa Fe County wishes to provide online live and chatbot services to enhance the customer service experience and engaging with customers wherever they are. The County intends to select and award a contract based upon the highest ranked proposal based on the qualifications provided within this Request for Proposals (RFP).

Offerors are urged to read and fully understand the requirements of the RFP so that their proposal may be considered and evaluated accordingly. Offerors must complete and submit a proposal that substantiates and presents evidence of the Offeror's abilities and expertise in providing the services needed.

### B. SCOPE OF WORK

All qualified service providers are invited to submit proposals. Offerors must demonstrate a capacity to meet the County's requirements as stated in the RFP No. 2023-0023-AO/APS. Offerors are to read and understand the terms, conditions and requirements of the Request for Proposals.

The services that Santa Fe County is looking for within the live chat and chatbot services are:

1. Cloud-based Chat Software System
2. Hardware and Software Requirements
3. Customized Chat Windows
4. Performance Reporting
5. Analytics
6. Team Collaboration
7. Real Time English/Spanish Translations
8. Surveys
9. Ability to Recognize Visitors
10. Ability to Route Chats
11. Internal Cooperation capabilities including the ability to transfer chat to other internal offices.
12. Ability to produce KPI Reports
13. Branding Capabilities
14. Chat and Messaging Capabilities
15. Operator Management Capabilities
16. Security and Reliability Capabilities
17. Multi-Platform Capabilities

18. Type of Training Opportunities (In-person/Virtual or Hybrid)
19. Integration Capabilities including the ability to be integrated with our CRM Portal
20. Ability to receive and share attachments
21. Ability to create customizable messages and forms to quickly answer customers
22. Ability to provide customized forms to customers within the chat experience
23. Options for “off hours” automated chatbot messages from 5:01pm to 7:59am during the weekdays; 24 hours on weekends and holidays
24. “Real-time” Customer Service Support
25. Fully Complete Appendices D

**General Specifications:**

1. System must provide live and chatbot software.
2. System must provide account configuration and implementation.
3. System must provide ability to report data and storage for no less than three (3) years.
4. System must provide training for users of online live and chatbot services.

**C. INSURANCE REQUIREMENTS**

The insurance required by Offeror are listed below.

1. General Conditions. Contractor shall submit evidence of insurance as is required herein. Policies of insurance shall be written by companies authorized to write such insurance in New Mexico.
2. General Liability Insurance, Including Automobile. Contractor shall procure and maintain during the life of this Agreement a comprehensive general liability and automobile insurance policy with liability limits in amounts not less than \$1,000,000 combined single limits of liability for bodily injury, including death, and property damage for any one occurrence. Said policies of insurance shall include coverage for all operations performed for County by Contractor; coverage for the use of all owned, non-owned, hired automobiles, vehicles and other equipment, both on and off work; and contractual liability coverage under which this Agreement is an insured contract. County of Santa Fe shall be a named additional insured on the policy.
3. Workers’ Compensation Insurance. Contractor shall comply with the provisions of the Workers’ Compensation Act.
4. Increased Limits. If, during the life of this Agreement, the Legislature of the State of New Mexico increases the maximum limits of liability under the Tort Claims Act (NMSA 1978, Sections 41-4-1 through 41-4-29, as amended), Contractor shall increase the maximum limits of any insurance required herein.

**D. DESIGNATED PROCUREMENT SPECIALIST**

The County has designated a Procurement Specialist Senior who is responsible for the conduct of this procurement whose name, address and telephone number is listed below. All deliveries via express carrier should be addressed as follows:

Amanda Patterson-Sanchez, Procurement Specialist Senior  
Santa Fe County Purchasing Division  
102 Grant Avenue, First Floor  
Santa Fe, NM 87501  
Phone: (505) 992-6753  
Email: [apatterson-sanchez@santafecountynm.gov](mailto:apatterson-sanchez@santafecountynm.gov)

Any inquiries or requests regarding this procurement should be submitted to the Procurement Specialist in writing. **Offerors may ONLY contact the Procurement Specialist listed above regarding the procurement. Other County employees do not have the authority to respond on behalf of the County.**

**E. DEFINITION OF TERMINOLOGY**

This section contains definitions and abbreviations that are used throughout this procurement document.

This section contains definitions and abbreviations that are used throughout this procurement document.

**“BCC”** means the Santa Fe County Board of County Commissioners

**“Close of Business”** means 5:00 PM Mountain Standard Time or Mountain Daylight Time, whichever is in effect on the date given.

**“Contract”** or **“Agreement”** means a written agreement for the procurement of items of tangible personal property or services.

**“Contractor”** means a successful Offeror who enters into a binding contract.

**“County”** means Santa Fe County.

**“Determination”** means the written documentation of a decision by the Procurement Manager including findings of fact supporting a decision. A determination becomes part of the procurement file.

**“Desirable”** The terms “may”, “can”, “should”, “preferably”, or “prefers” identify a desirable or discretionary item or factor (as opposed to “mandatory”).

**“Evaluation Committee”** means a body appointed by the County management to perform the evaluation of offeror proposals.

**“Finalist”** is defined as an offeror who meets all the mandatory specifications of this Request for Proposals and whose score on evaluation factors is sufficiently high to merit further consideration by the Evaluation Committee.

**“Mandatory”** The terms “must”, “shall”, “will”, “is required”, or “are required”, identify a mandatory item or factor (as opposed to “desirable”). Failure to meet a mandatory item or factor will result in the rejection of the offeror’s proposal.

**“Offeror”** is any person, corporation, or partnership who chooses to submit a proposal.

**“Procurement Specialist”** means the person or designee authorized by the County to manage or administer a procurement requiring the evaluation of competitive sealed proposals.

**“Purchasing Division”** means the Santa Fe County Purchasing Division, Finance Department.

**“Request for Proposals”** or **“RFP”** means all documents, including those attached or incorporated by reference, used for soliciting proposals.

**“Responsible Offeror”** means an offeror who submits a responsive proposal and who has furnished, when required, information and data to prove that its financial resources, production or service facilities, personnel, service reputation and experience are adequate to make satisfactory delivery of the services or items of tangible personal property described in the RFP.

**“Responsive Offer”** or **“Responsive Proposal”** means an offer or proposal which conforms in all material respects to the requirements set forth in the request for proposals. Material respects of a request for proposals include, but are not limited to, price, quality, quantity or delivery requirements.

### III. CONDITIONS GOVERNING THE PROCUREMENT

This section of the RFP contains the schedule for the procurement, describes the major procurement events and the conditions governing the procurement.

#### A. SEQUENCE OF EVENTS

The Procurement Specialist will make every effort to adhere to the following schedule:

<u>Action</u>	<u>Responsibility</u>	<u>Date</u>
1. Issuance of RFP	Purchasing Division	September 11 & 12, 2022
2. Pre-Proposal Conference	Owner/Offerors/ Purchasing	September 20
3. Acknowledgement of Receipt Form	Offerors	September 23
4. Deadline to Submit Additional Questions	Offerors	September 23
5. Response to Written Questions	Purchasing Division	September 28
<b>6. Submission of Proposal</b>	<b>Offerors</b>	<b>October 13 (2:00PM MDT)</b>
7. Proposal Evaluation Review	Evaluation Committee	October, 2022
8. Selection of Finalist	Evaluation Committee	October, 2022
9. Oral Presentation by Finalists (if applicable)	Offeror	October, 2022
10. Contract Negotiations	County, Offeror	November, 2022
11. Contract Award	Purchasing Division	November, 2022

**Note:** *If the Evaluation Committee makes a selection at the Selection of Finalists, event 9 will not occur.*

**B. EXPLANATION OF EVENTS**

The following paragraphs describe the activities listed in the sequence of events shown in Section III, Paragraph A.

**1. Issuance of RFP**

This RFP is being issued by the Santa Fe County Purchasing Division.

**2. Pre-Proposal Conference**

A Pre-Proposal Conference is scheduled to occur on the date indicated in the Sequence of Events at Section III.A. Questions may be submitted at the Pre-Proposal Conference and until the date indicated in the Sequence of Events at Section III.A.

**All questions must be in writing and e-mailed to [apatterson-sanchez@santafecountynm.gov](mailto:apatterson-sanchez@santafecountynm.gov).** A public log will be kept of the names of potential offerors who attended the Pre-Proposal Conference and the Site Visit.

**3. Acknowledgement of Receipt Form**

Potential offerors should hand-deliver, return by facsimile or e-mail the Acknowledgement of Receipt Form provided as Appendix A to have its name and firm placed on the procurement distribution list. The form should be signed by an authorized representative of the organization, dated and returned by close of business on *Friday, September 23, 2022*.

The procurement distribution list will be used for the distribution of written responses to questions and any RFP addenda.

**4. Deadline to Submit Additional Written Questions**

Potential offerors may submit written questions regarding this RFP until the close of business on the date indicated in the Sequence of Events at Section III.A. All written questions must be addressed to the Procurement Specialist, listed in Section II.E and sent via facsimile or e-mail. ***Any contact with any other County staff member or persons other than the Procurement Specialist named in this solicitation may be grounds for disqualification.***

**5. Response to Written Questions**

Written responses to written questions and any RFP addenda will be distributed on the date indicated in the Sequence of Events at Section III.A, to all potential offerors whose names appear on the procurement distribution list.

Additional written requests for clarification of distributed answers or addenda must be received by the Procurement Specialist no later than one (1) day after the answers or addenda were issued.

6. **Submission of Proposal**

**ALL OFFEROR PROPOSALS MUST BE RECEIVED FOR REVIEW AND EVALUATION BY THE PROCUREMENT MANAGER OR DESIGNEE NO LATER THAN 2:00 PM, Thursday, October 13, 2022. *Proposals received after this deadline will not be accepted.*** The date and time of receipt will be recorded on each proposal. Proposals must be addressed and delivered to the Procurement Manager at the address listed in Section II.E. Proposals must be sealed and labeled on the outside of the package to clearly indicate that they are in response to the County's Request for Proposals No. 2023-0023-AO/APS. **Proposals may also be submitted electronically via Dropbox at the link provided <https://www.dropbox.com/request/H08JXyBhWxOTH90JFyZZ>.**

**Proposals must be delivered to:**

Amanda Patterson-Sanchez, Procurement Specialist Senior  
Santa Fe County Purchasing Division  
102 Grant Avenue (First Floor)  
Santa Fe, New Mexico 87501

A public log will be kept of the names of all offeror's who submitted proposals. Pursuant to NMSA 1978, Section 13-1-116, the contents of any proposal shall not be disclosed so as to be available to competing offerors during the negotiation process.

7. **Proposal Evaluation**

The evaluation of proposals will be performed by an Evaluation Committee appointed by the Procurement Specialist. This process will take place during the timeframe indicated in the Sequence of Events at III.A. During this time, the Procurement Specialist may initiate discussions with offerors who submit responsive or potentially responsive proposals for the purpose of clarifying aspects of the proposals, but proposals may be accepted and evaluated without such discussion. **Discussions SHALL NOT be initiated by the offerors.**

8. **Selection of Finalists (If Applicable)**

The Evaluation Committee may select and the Procurement Specialist may notify the finalist offerors on the date indicated in the Sequence of Events at Section III.A. Only finalists will be invited to participate in the subsequent steps of the procurement if the finalist process is used.

9. **Best and Final Offers from Finalists (If Applicable)**

Finalist offerors may be asked to submit revisions to their proposals for the purpose of obtaining best and final offers by the date indicated in the Sequence of Events at Section III.A.

10. **Oral Presentation by Finalists (If Applicable)**

Finalist offerors may be required to present their proposals to the Evaluation Committee. The Procurement Specialist will schedule the time for each offeror presentation. All finalist offerors will be contacted to schedule presentations providing a location and instructions for the Oral presentations. Each presentation will be limited to one (1) hour in duration.

11. **Contract Negotiations**

The contract will be finalized with the most advantageous offeror during the timeframe indicated in the Sequence of Events at Section III.A. In the event that mutually agreeable terms cannot be reached within the time specified, the County reserves the right to finalize a contract with the next most advantageous offeror without undertaking a new procurement process.

12. **Contract Award**

The County anticipates awarding the contract on the date in the Sequence of Events at Section III.A. These dates are subject to change at the discretion of the Santa Fe County Purchasing Specialist or Procurement Manager.

The contract shall be awarded to the offeror or offerors whose proposal is most advantageous to the County, taking into consideration the evaluation factors set forth in the RFP. The most advantageous proposal may or may not have received the most points.

13. **Right to Protest**

Any protest by an offeror must be timely and in conformance with NMSA 1978, Section 13-1-172 and applicable procurement regulations. Protests must be written and must include the name and address of the protestor and the request for proposals number. It must also contain a statement of grounds for protest including appropriate supporting exhibits. The protests must be delivered to the Santa Fe County Purchasing Division:

Santa Fe County Procurement Office  
P.O. Box 276  
Santa Fe, New Mexico 87504

**Protests will not be accepted by facsimile or other electronic means.**  
**Protests received after the deadline will not be accepted.**

**C. GENERAL REQUIREMENTS**

This procurement will be conducted in accordance with Chapter 13, NMSA 1978, NMAC 1.4.1 and the Santa Fe County Procurement Regulations.

**1. Acceptance of Conditions Governing the Procurement**

Offerors must indicate their acceptance of the Conditions Governing the Procurement section in the letter of transmittal. Submission of a proposal constitutes acceptance of the terms and conditions of the contract template attached hereto as Appendix E.

**2. Incurring Cost**

Any cost incurred by the offeror in preparation, transmittal, presentation of any proposal or material submitted in response to this RFP shall be borne solely by the offeror.

**3. Prime Contractor Responsibility**

Any contract that may result from this RFP shall specify that the prime contractor is solely responsible for fulfillment of the contract with the County. The County will make contract payments to only the prime contractor.

**4. Subcontractors**

Use of subcontractors must be clearly explained in the proposal, and major subcontractors must be identified by name. The prime contractor shall be wholly responsible for the performance of the contract with the County whether or not subcontractors are used.

**5. Amended Proposals**

An offeror may submit an amended proposal before the deadline for receipt of proposals. Such amended proposal must be a complete replacement of the previously submitted proposal and must be clearly identified as such in the transmittal letter. County personnel will not merge, collate, or assemble proposal materials.

**6. Offerors' Rights to Withdraw Proposal**

Offerors will be allowed to withdraw their proposals at any time prior to the deadline for receipt of proposals. The offeror must submit a written withdrawal request signed

by the offeror's duly authorized representative addressed to the Procurement Specialist. The approval or denial of withdrawal requests received after the deadline for receipt of the proposals is governed by the applicable procurement regulations.

**7. Proposal Offer Firm**

Responses to this RFP, including proposal prices, will be considered firm for 90 days after the due date for receipt of proposals or 90 days after receipt of a best and final offer if one is submitted.

**8. Disclosure of Proposal Contents**

Proposals shall not be opened publicly and shall not be open to public inspection until after an offeror has been selected for award of a contract.

An offeror may request in writing non-disclosure of confidential data. Proprietary or confidential data shall be readily separable from the proposal in order to facilitate eventual public inspection of the non-confidential portion of the proposal. Confidential data is normally restricted to confidential financial information concerning the offeror's organization and data that qualifies as a trade secret in accordance with the Uniform Trade Secrets Act, 57-3A-1 to 57-3A-7, NMSA 1978. The price of products offered or the cost of services proposed shall not be designated as proprietary or confidential information.

If a request is received for disclosure of data for which an offeror has made a written request for confidentiality, the Santa Fe County Procurement Manager shall examine the offeror's request and make a written determination that specifies which portions of the proposal should be disclosed. Unless the offeror takes legal action to prevent the disclosure, the proposal will be so disclosed. The proposal shall be open to public inspection subject to any continuing prohibition on the disclosure of confidential data.

**9. No Obligation**

This procurement in no manner obligates Santa Fe County or any of its departments to the use of any proposed professional services until a valid written contract is awarded and approved by the appropriate authorities.

**10. Termination**

This RFP may be canceled at any time and any and all proposals may be rejected in whole or in part when the County determines such action to be in the best interest of the County.

**11. Sufficient Appropriation**

Any contract awarded as a result of this RFP process may be terminated if sufficient appropriations or authorizations do not exist. Such termination will be effected by sending written notice to the contractor. The County's decision as to whether sufficient appropriations and authorizations are available will be accepted by the contractor as final.

**12. Legal Review**

The County requires that all offerors agree to be bound by the General Requirements contained in this RFP. Any offeror concerns must be promptly brought to the attention of the Procurement Specialist.

**13. Governing Law**

This procurement and any agreement with offerors that may result shall be governed by the laws of the State of New Mexico.

**14. Basis for Proposal**

Only information supplied by the County in writing through the Procurement Specialist or in this RFP should be used as the basis for the preparation of offeror proposals.

**15. Contract Terms and Conditions**

The contract between the County and the Contractor will follow the format specified by the County and contain the terms and conditions set forth in Appendix E.

**16. Contract Deviations**

Any additional terms and conditions, which may be the subject of negotiation, will be discussed only between the County and the selected offeror and shall not be deemed an opportunity to amend the proposal.

**17. Offeror Qualifications**

The Evaluation Committee may make such investigations as necessary to determine the ability of the offeror to adhere to the requirements specified within this RFP. The Evaluation Committee will reject the proposal of any offeror who is not a responsible offeror or fails to submit a responsive offer as defined in Sections 13-1-83 and 13-1-85 NMSA, 1978, subject to Procurement Manager approval.

**18. Right to Waive Minor Irregularities**

The Evaluation Committee reserves the right to waive minor technical irregularities. This right is at the sole discretion of the Evaluation Committee subject to the Procurement Manager approval.

**19. Change in Contractor Representatives**

The County reserves the right to require a change in contractor representatives if the assigned representatives are not, in the opinion of the County, meeting the County's needs adequately. Any change in contractor representative must receive prior County approval.

**20. Notice**

The Procurement Code, Sections 13-1-28 through 13-1-199, NMSA 1978, imposes civil and misdemeanor criminal penalties for its violation. In addition, the New Mexico criminal statutes impose felony penalties for bribes, gratuities and kick-backs.

**21. County Rights**

The County reserves the right to accept all or a portion of an offeror's proposal.

**22. Right to Publish**

Throughout the duration of this procurement process and contract term, potential offerors and contractors must secure from the County written approval prior to the release of any information that pertains to the potential work or activities covered by this procurement or the subsequent contract. Failure to adhere to this requirement may result in disqualification of the offeror's proposal or termination of the contract.

**23. Ownership of Proposals**

All documents submitted in response to this Request for Proposals shall become the property of the County. However, any technical or user documentation submitted with the proposals of non-selected offerors shall be returned after the expiration of the protest period.

**24. Electronic Mail Address Recommended**

A large part of the communication regarding this procurement will be conducted by electronic mail (e-mail). It is recommended that the offeror should have a valid e-mail address to receive e-mail correspondence.

**25. Preferences in Procurement by Santa Fe County**

**a. *New Mexico In-state Preference.***

New Mexico law, Section 13-4-2 NMSA 1978, provides a preference in the award of a public works contract for an “**in-state resident contractor**”. Application of a resident contractor preference for any Offeror requires the Offeror to provide a copy of a valid and current certificate as a resident contractor. Certificates are issued by the state taxation and revenue department.

If an Offeror submits with its proposal a copy of a valid and current in-state resident contractor certificate, 5% of the total weight of all evaluation factors used in the evaluation of proposals may be awarded or added to the Offerors score.

Certification by the department of taxation and revenue for the resident contractor takes into consideration such activities as the business’ payment of property taxes or rent in the state and payment of unemployment insurance on employees who are residents of the state.

**OR**

**b. *New Mexico Resident Veteran Preference.***

New Mexico law, Section 13-4-2 NMSA 1978, provides a preference in the award of a public works contract for a “**resident veteran contractor**”. Certification by the department of taxation and revenue for the resident veteran business requires the Offeror to provide evidence of annual revenue and other evidence of veteran status.

An Offeror who wants the veteran contractor preference to be applied to its proposal is required to submit with its proposal the certification from the department of taxation and revenue and the sworn affidavit attached hereto as Appendix C.

If an Offeror submits with its proposal a copy of a valid and current veteran resident contractor certificate, 10%, of the total weight of all the evaluation factors used in the evaluation of proposals may be awarded or added to the Offeror’s score.

**The resident contractor preference is not cumulative with the resident veteran contractor preference.**

**AND**

**c. *Santa Fe County Business Preference***

Santa Fe County Ordinance 2012-4 provides for a **County preference** for a “Santa Fe County business.” Application of the County preference in procurement requires an Offeror to obtain and provide a Santa Fe County Business Certificate issued by the Santa Fe County Procurement Manager. Certification by the Procurement Manager takes into consideration the business’ corporate standing in the state, business licensure or registration, the duration of the business’ primary office location and the payment of taxes.

If an Offeror submits with its proposal a copy of its Santa Fe County Business Certificate issued by the Purchasing Manager, 5% of the total weight of all the evaluation factors used in the evaluation of proposals may be awarded to the Offerors score.

*The Resident Business, Resident Veteran Business or Santa Fe County Business preferences do not apply to procurement of services or goods involving federal funds or federal grant funds.*

**26. Double-Sided Documents**

All submitted bids/proposal documents shall be double-sided, pursuant to Santa Fe County Resolution 2013-7, Adopting Sustainable Resource Management Principles, Section 2. A. Waste Reduction and Reuse...” all documents are to be double-sided, including those that are generated by outside entities using County funds and by consultants and contractors doing business with the County”.

**27. Living Wage**

Contractor shall comply with the requirements of Santa Fe County Ordinance No. 2014-1 (Establishing a Living Wage).

#### IV. RESPONSE FORMAT AND ORGANIZATION

##### A. NUMBER OF RESPONSES

Offerors shall submit only one response to this RFP.

##### B. NUMBER OF COPIES

Offerors shall deliver one (1) original and four (4) identical copies of their proposal to the location specified in Section II, Paragraph E on or **before** the closing date and time for receipt of proposals. If submitting responses electronically via Dropbox, please submit two (2) separate files: one file for the proposal response and a separate file the Appendix D Proposed Fee Schedule.

##### C. PROPOSAL FORMAT

All proposals shall be limited to twenty (20) pages, with exception to professional licenses and certifications, which shall be added as appendices. The document shall be typewritten on standard 8 1/2 x 11 paper, with a font **no smaller than 12 pt. pitch**, with nominal 1” margins and normal line spacing. Proposals shall be bound with tabs delineating each section.

To combat the spread of the recent COVID-19 illness, the submission of Proposals **will be accepted electronically** utilizing a DropBox. Please utilize this link to upload your proposal submission <https://www.dropbox.com/request/H08JXyBhWxOTH90JFyZZ>.

##### 1. Proposal Organization

The proposal must be organized and indexed in the following format and must contain, as a minimum, all listed items in the sequence indicated.

- a) Letter of Transmittal
- b) Response to County Terms and Conditions
- c) Table of Contents (optional)
- d) Response to Specifications – Evaluation Factors
- e) Copy of insurance certificate
- f) Cost Proposal (**One in a separate sealed envelope with the original proposal submission only, if submitting electronically submit as a separate file**)
- g) Campaign Contribution Disclosure Statement

Within each section of their proposal, offerors should address the items in the order in which they appear in this RFP under Section V.B. EVALUATION FACTORS. All forms provided in the RFP must be thoroughly completed and included in the appropriate section of the proposal.

*Any proposal that does not adhere to these requirements may be deemed non-responsive and rejected on that basis.*

The **proposal summary** may be included by offerors to provide the Evaluation Committee with an overview of the technical and business features of the proposal; however, this material will not be used in the evaluation process unless specifically referenced from other portions of the offeror's proposal.

Offerors may attach other materials that they feel may improve the quality of their responses. However, these materials should be included as items in a separate appendix.

2. **Letter of Transmittal**

Each proposal must be accompanied by a letter of transmittal. The letter of transmittal MUST:

- a) Identify the submitting person or organization;
- b) Identify the name and title of the person authorized by the organization to contractually obligate the organization;
- c) Identify the name, title and telephone number of the person authorized to negotiate the contract on behalf of the organization;
- d) Identify the names, titles and telephone numbers of persons to be contacted for clarification;
- e) **Explicitly** indicate Acceptance of the Conditions Governing the Procurement stated in Section III, Paragraph C.1;
- f) Be signed by the person authorized to contractually obligate the organization;
- g) Acknowledge receipt of any and all amendments to this RFP;
- h) Acknowledge and acceptance of the terms and conditions of the Agreement attached as Appendix E.

**THIS SECTION LEFT INTENTIONALLY BLANK**

## V. SPECIFICATIONS

Offerors should respond in the form of a thorough narrative to each mandatory specification. The narratives along with required supporting materials will be evaluated and awarded points accordingly.

### A. **INFORMATION**

#### Time Frame

The contract is scheduled to begin September, 2021 Santa Fe County intends on awarding a contract with a term of one (1) year with an option for three (3) renewal periods, not to exceed four (4) years in total.

### B. **EVALUATION CRITERIA**

A brief explanation of each mandatory specification is listed below. Offerors are encouraged to fully address each category completely, as points are assigned for responses to each.

#### 1. **Introduction**

- Describe the vendors vision/mission and business philosophy.
- Provide an overview of the vendor, including evidence of being a qualified vendor to implement an Online Live and Chatbot Services.

#### 2. **Technical Competence and Specialized Experience**

- Describe your Firm's specific technical experience with providing services comparable to the Scope of Work required in this RFP.
- Include years of experience providing these services for similar government entities of comparable size and complexity.
- Indicate the relevance of previous service contracts to the scope of work, including any specialized experience.
- Provide evidence of the vendor's knowledge, skills and ability to design and implement a software system of similar scope.
- Provide information on software functionality and capabilities.

#### 3. **Evidence of Understanding Scope of Work**

- Provide an in-depth response and understanding of the requested scope of work.
- Describe the services to be provided that correlates to the scope of work. Include information regarding the work plan.
- Specify how your services will meet and exceed the requirements of Santa Fe County.
- Provide information regarding hosting and data recovery plan.

- Discuss challenges, limitations or restrictions that might be expected based on this service, including existing conditions, location, site or any other factors.

**4. Capacity and Capability**

- Include your team's organization and working relationships.
- Explain your project team's current workload and projected workload as demonstrating the ability to successfully provide and complete the requirements of the scope of services in a timely manner.
- Include information of any subcontractor or consultant that the Offer has indicated to be part of the project team including what areas of work they will perform.
- Any services that cannot be provided as required shall be noted.

**C. COST PROPOSAL (Appendix D) - provide in a separate sealed envelope with the original proposal ONLY (do not include in each of the four additional copies, if submitting electronically, please submit in a separate file in Dropbox).**

Offeror shall propose its cost for the tasks listed in the scope of work. A cost sheet is provided as Appendix E.

**THIS SECTION LEFT INTENTIONALLY BLANK**

**VI. EVALUATION**

**A. EVALUATION SCORING**

The County will evaluate responsive proposals and assign a numerical score in each category, not to exceed the maximum allowed score for that category, as determined through the Offeror’s attention to the factor detailed in the following sections. The amount of discussion to be applied to each listed topic is an individual choice of the Offeror; however, discussion should be detailed enough to inform and educate the Evaluation Committee Members.

Proposals will be scored based upon a comparison of the information submitted by each Offeror against the evaluation factors outlined below. Each Evaluation Factor is assigned the following points:

- 1. Introduction ..... **100 points**
- 2. Technical Competence & Specialized Experience ..... **300 points**
- 3. Evidence of Understanding Scope ..... **300 points**
- 4. Capacity & Capability ..... **300 points**
- TOTAL POINTS ..... 1000 points**

**PREFERENCES**

If a proposal contains an In-State Resident Business Certificate or Resident Veterans Business Certificate and/or Santa Fe County Business Certificate, the applicable preference will be applied.

- 5. Proposal contains a valid N.M. Resident Business Certificate..... **50 points**

**OR**

- 6. Proposal contains a valid Resident Veteran Business Certificate..... **100 points**

**AND**

- 7. Proposal contains a valid Santa Fe County Business Certificate.....**50 points**

**B. EVALUATION PROCESS**

The evaluation process will follow the steps listed below:

1. All proposals will be reviewed for compliance with the mandatory specifications stated within the RFP. Proposals deemed non-responsive will be eliminated from further consideration.
2. The Procurement Specialist may contact the Offeror for clarification of the response as specified in Section III, Paragraph B.7.
3. The Evaluation Committee may use other sources of information to perform the evaluation as specified in Section III, Paragraph C.18.
4. Responsive proposals will be evaluated on the factors in Section V that have been assigned a point value. The responsible Offerors with the highest scores will be selected as finalist Offerors 'shortlisted' based upon the proposals submitted. If an oral presentation is recommended, the 'shortlisted' firms will be provided questions by the Selection Committee for their "Oral Presentations." Each presentation will be evaluated by the Selection Committee. The oral presentation that receives the highest points and is most advantageous to the County, taking into consideration the evaluation factors in Section VI, will be recommended for contract award as specified in Section III, Paragraph B.11. Only the points from the Oral Presentation will be calculated for most & highest qualified firms. Points from the "shortlisted" evaluations will only be used if there is a tie resulting from the Oral Presentations. Please note, however, that a serious deficiency in the response to any one factor may be grounds for rejection regardless of overall score.
5. Past performance in a project for the County (See Section V.C.3 above) is a significant consideration of the evaluation and poor performance on a prior County project may result in a lower number of points awarded to a proposal for this element of the evaluation.

**APPENDIX A**

**ACKNOWLEDGEMENT OF RECEIPT FORM  
ONLINE LIVE AND CHATBOT SERVICES  
RFP NO. 2023-0023-AO/APS**

In acknowledgement of receipt of this Request for Proposal the undersigned agrees that he/she has received a complete copy, beginning with the title page and table of contents, and ending with Appendix E.

The acknowledgement of receipt should be signed and returned to the Procurement Specialist no later than close of business on **September 23, 2022**. Only potential Offerors who elect to return this form completed with the indicated intention of submitting a proposal will receive copies of all Offeror written questions and the County's written responses to those questions as well as RFP amendments, if any are issued.

FIRM: \_\_\_\_\_

REPRESENTED BY: \_\_\_\_\_

TITLE: \_\_\_\_\_ PHONE NO.: \_\_\_\_\_

E-MAIL: \_\_\_\_\_ FAX NO.: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP CODE: \_\_\_\_\_

SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_

This name and address will be used for all correspondence related to the Request for Proposal.

Firm does/does not (**circle one**) intend to respond to this Request for Proposals.

Amanda Patterson-Sanchez, Procurement Specialist Senior  
Santa Fe County Purchasing Division  
102 Grant Avenue (First Floor)  
Santa Fe, New Mexico 87501  
Phone: (505) 992-6753  
Email: apatterson-sanchez@santafecountynm.gov

## APPENDIX B

### CAMPAIGN CONTRIBUTION DISCLOSURE FORM

Pursuant to NMSA 1978, § 13-1-191.1 (2006), any person seeking to enter into a contract with any state agency or local public body **for professional services, a design and build project delivery system, or the design and installation of measures the primary purpose of which is to conserve natural resources** must file this form with that state agency or local public body. This form must be filed even if the contract qualifies as a small purchase or a sole source contract. The prospective contractor must disclose whether they, a family member or a representative of the prospective contractor has made a campaign contribution to an applicable public official of the state or a local public body during the two years prior to the date on which the contractor submits a proposal or, in the case of a sole source or small purchase contract, the two years prior to the date the contractor signs the contract, if the aggregate total of contributions given by the prospective contractor, a family member or a representative of the prospective contractor to the public official exceeds two hundred and fifty dollars (\$250) over the two year period.

Furthermore, the state agency or local public body shall void an executed contract or cancel a solicitation or proposed award for a proposed contract if: 1) a prospective contractor, a family member of the prospective contractor, or a representative of the prospective contractor gives a campaign contribution or other thing of value to an applicable public official or the applicable public official's employees during the pendency of the procurement process or 2) a prospective contractor fails to submit a fully completed disclosure statement pursuant to the law.

**THIS FORM MUST BE FILED BY ANY PROSPECTIVE CONTRACTOR WHETHER OR NOT THEY, THEIR FAMILY MEMBER, OR THEIR REPRESENTATIVE HAS MADE ANY CONTRIBUTIONS SUBJECT TO DISCLOSURE.**

The following definitions apply:

**“Applicable public official”** means a person elected to an office or a person appointed to complete a term of an elected office, who has the authority to award or influence the award of the contract for which the prospective contractor is submitting a competitive sealed proposal or who has the authority to negotiate a sole source or small purchase contract that may be awarded without submission of a sealed competitive proposal.

**“Campaign Contribution”** means a gift, subscription, loan, advance or deposit of money or other thing of value, including the estimated value of an in-kind contribution, that is made to or received by an applicable public official or any person authorized to raise, collect or expend contributions on that official's behalf for the purpose of electing the official to either statewide or local office. “Campaign Contribution” includes the payment of a debt incurred in an election campaign, but does not include the value of services provided without compensation or unreimbursed travel or other personal expenses of individuals who volunteer a portion or all of their time on behalf of a candidate or political

committee, nor does it include the administrative or solicitation expenses of a political committee that are paid by an organization that sponsors the committee.

“**Family member**” means spouse, father, mother, child, father-in-law, mother-in-law, daughter-in-law or son-in-law.

“**Pendency of the procurement process**” means the time period commencing with the public notice of the request for proposals and ending with the award of the contract or the cancellation of the request for proposals.

“**Person**” means any corporation, partnership, individual, joint venture, association or any other private legal entity.

“**Prospective contractor**” means a person who is subject to the competitive sealed proposal process set forth in the Procurement Code or is not required to submit a competitive sealed proposal because that person qualifies for a sole source or a small purchase contract.

“**Representative of a prospective contractor**” means an officer or director of a corporation, a member or manager of a limited liability corporation, a partner of a partnership or a trustee of a trust of the prospective contractor.

DISCLOSURE OF CONTRIBUTIONS:

Contribution Made By: \_\_\_\_\_

Relation to Prospective Contractor: \_\_\_\_\_

Name of Applicable Public Official: \_\_\_\_\_

Date Contribution(s) Made: \_\_\_\_\_  
\_\_\_\_\_

Amount(s) of Contribution(s) \_\_\_\_\_  
\_\_\_\_\_

Nature of Contribution(s) \_\_\_\_\_  
\_\_\_\_\_

Purpose of Contribution(s) \_\_\_\_\_  
\_\_\_\_\_

(Attach extra pages if necessary)

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Title (position)

**--OR--**

**NO CONTRIBUTIONS IN THE AGGREGATE TOTAL OVER TWO HUNDRED FIFTY DOLLARS (\$250) WERE MADE** to an applicable public official by me, a family member or representative.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_

**APPENDIX C  
RESIDENT VETERANS PREFERENCE CERTIFICATION**

\_\_\_\_\_ (NAME OF CONTRACTOR) hereby certifies the following in regard to application of the resident veterans’ preference to this procurement.

**Please check one box only:**

I declare under penalty of perjury that my business prior year revenue starting January 1 ending December 31 is less than \$1M allowing me the 10% preference discount on this solicitation. I understand that knowingly giving false or misleading information about this fact constitutes a crime.

“I agree to submit a report or reports to the State Purchasing Division of the General Services Department declaring under penalty of perjury that during the last calendar year starting January 1 and ending on December 31, the following to be true and accurate:

“In conjunction with this procurement and the requirements of this business application for a Resident Veteran Business Preference/Resident Veteran Contractor Preference under Sections 13-1-21 or 13-1-22 NMSA 1978, which awarded a contract which was on the basis of having such veterans preference, I agree to report to the State Purchasing Division of the General Services Department the awarded amount involved. I will indicate in the report the award amount as a purchase from a public body or as a public works contract from a public body as the case may be.”

“I understand that knowingly giving false or misleading information on this report constitutes a crime”.

I declare under penalty of perjury that this statement is true to the best of my knowledge. I understand that giving false or misleading statements about material fact regarding this matter constitutes a crime.

\_\_\_\_\_  
(Signature of Business Representative)\*

\_\_\_\_\_  
(Date)

\*Must be an authorized signatory of the Business.

The representations made in checking the boxes constitutes a material representation by the business that is subject to protest and may result in denial of an award or un-award of the procurement involved if the statements are proven to be incorrect.

SIGNED AND SEALED THIS \_\_\_\_\_ DAY OF \_\_\_\_\_, 2022.

\_\_\_\_\_  
NOTARY PUBLIC

My Commission Expires:  
\_\_\_\_\_

Appendix D

Question	Answer
Based on our requirements and information provided, what is the estimated monthly cost for your live chat software?	
Is this a flat monthly cost?	
Is it based on number of concurrent logins or named user?	
Is there a cap or service fee rate for number of visitors or chats?	
Is technical or sales support an additional fee?	
How easy is it to scale up and/or down licenses/fees?	
Are there any setup or onboarding fees?	
Are there any overage charges?	
What is your termination policy?	
Can you accept Net 30 terms?	
What is included in annual maintenance and support fee (in an on-premises model)?	
What is included in SaaS model /subscription fee?	

Software as a Service (SaaS)					
QTY	License Description	Pricing (License Should Incl. Annual Maintenance/Support (24x7))	Professional Services (Implementation & setup)		
Minimum 10 Licenses (Initial License)					
Additional Every 10 Licenses					

Subscription License Mode (On-Premises)				
QTY	License Description	Annual Subscription License Cost	Annual Maintenance/Support (24x7)	Professional Services (Implementation & Setup)
Minimum of 10 Licenses (Initial License)				
Additional Every 10 Licenses				

Perpetual License Model (On-Premises)				
QTY	License Description	Perpetual License Cost	Annual Maintenance/Support (24x7)	Professional Services (Implementation & Setup)
Minimum of 10 Licenses (Initial license)				
Additional Every 10 Licenses				

Professional Services	
Job Title	Rate / Hour
Programmer, Tester, Technical Project Officer	
Business Analyst, Designer, DB Analyst, Team Leader, Senior Programmer	
Project Manager, Technical Architect, Senior Business Analyst, Senior Designer,	
Senior Project Manager, Technology Expert, Senior Technical Architect, Product Manager	
Trainer	
Solution Consultant	

## Appendix E

ID	Question	Answer
	<b>Company Overview</b>	
	What is the name of your company?	
	When was your company founded?	
	Where is your company located?	
	Provide organization overview.	
	Has your company or a predecessor ever filed for bankruptcy? If yes, please provide the details.	
	In the last 2 years, were there any legal actions against your company? If yes, please provide details.	
	<b>Live Chat in General</b>	
	Please provide the history of your live chat software?	
	Do you have any existing customers in our industry? If so, can you provide their contact information for a reference check?	
	What are your key features and advantages when compared to other live chat vendors?	
	<b>Implementation, Support and Service</b>	
	What is the implementation complexity?	
	What is your average length of time for a typical implementation/setup?	
	What level of expertise is required to manage the software?	
	What training program do you offer? Please explain the details.	
	Do you provide any type of consultation service to optimize and make recommendations to improve customer satisfaction, professionalism and internal efficiencies?	
	What is the technical service support model?	
	Do you provide 24/7 support?	
	What is your SLA for technical support?	
	What is the preferred method to contact the support personnel in an event of an emergency?	
	What is your Incident Resonse or Incident Escalation Plan?	
	Do you provide a dedicated account manager to our account? what is his/her availability and SLA for responses?	
	What training materials and user manuals will be provided?	
	<b>Hardware and Software Requirement</b>	
	What are the software compatibility and requirements?	
	What are the hardware requirements?	
	<b>Security and Reliability</b>	
	What type of security measures are deployed to meet necessary security standards?	
	How is the network communication encrypted?	
	What type of security scans or auditing do you run?	
	What is your security policy.	
	Where is your data center located?	
	What security measures, certificate and auditing does your data center have?	
	Do you have anti DDOS mechanism in place?	
	Do you have password policy in your software?	
	Do you have auditing feature in your software?	
	Can we run a Penetrate Test on your service?	
	What is your downtime history in the past 6 months?	
	What is your policy on scheduled downtime?	
	What are your Disaster Recovery (DR) and Business Continuity Plan (BCP)?	
	How often is your DR and BCP plan tested?	
	What kind of redundancy do your servers and network have?	

ID	Requirement Description	If Available (Y/N)	Comment	Roadmap for This Requirement (If Not Available)
<b>Recognize Visitors</b>				
<b>Collect Info</b>				
	Pre-Chat Survey			
	Visitor Details			
	Visitor Footprint Tracking			
	Visitor Contact History			
	Chat Transcripts & Offline Messages			
	Post-Chat Survey			
	All Visitors' Navigation History			
	Custom Fields (For Visitor Info Collection)			
	Custom Variables			
	Visitor Single Sign On			
	Manually Push Survey			
	Custom Fields (For Chats Description)			
<b>Routing</b>				
	Auto Accept Chat			
	Chat Queue			
	Route Visitors to a Specified Operator			
	Last-Chatting Operator Preferred			
	Department/Skill Routing			
	Rule-based Routing			
	Load Balancing Auto Assignment			
	Round Robin Auto Assignment			
	Capability Weighted Auto Assignment			
<b>Chats and Messages</b>				
<b>Basic</b>				
	Unlimited Concurrent Chats			
	Unlimited Canned Messages & URLs			
	Visual & Sound Alerts			
	Built-in Spell Checker			
	Shortcut			
	Offline Message Form			
	Operator Away Mode			
	Send Greeting Message Automatically			
	Transcripts Available for Query			
	Optimized Invitations for Embedded Chat Window			
	Multi-Level Canned Responses			
	Canned Responses Import			
	Canned Responses Input Synchronous Matching			
	Canned Files			
	Emoticon			
<b>Advanced</b>				
	Typing Indicator			
	Drag & Drop File Transfer			
	Screenshot and Image Sending			
	Automatically End Chats			
	Ban Visitors by Id, IP or IP Range			
	Send Transcript to Email			

Auto-Forward Offline Message to Email			
Proactive Manual Invitation			
Auto Time-on-Site Invitation			
Rule-Based Auto Invitation			
Auto-Away When Keyboard and Mouse are Idle for a Certain Period of Time			
Built-in Translation Tool			
Built-In Remote Assistance or Integration			
Call Back			
Voice Chat			
Operator Busy Mode (Custom Mode)			
Chat Topic			
Chat Value			
Auto Reply when Operators Do Not Have Response for a Long Time			
Message Topic			
<b>Operator Management</b>			
Operator Permission Settings			
Monitor or Join an Ongoing Chat			
Department			
Role Management			
Post-Chat Customer Rating			
Backup Department			
Working Schedule			
<b>KPI Reports</b>			
<b>Visitors</b>			
Keywords Report			
Search Engine Report			
Visitor Geography Report			
Visitor Source Report			
<b>Chats</b>			
Chat Validity Report (Base on Missed & Refused Chats Report)			
Request Page Report			
Closed Reason Report			
Queue Time Report			
24 Hours Distribution Report			
Chat Topic Report			
Chat Value Report			
<b>Operators</b>			
Customer Rating Report			
Operator Online Time Report			
Operator Workload Report			
Operator Collaboration Report			
Operator Efficiency Report			
Operator Overall Report			
Staffing Prediction (Suggesting How Many Operators Needed for Each Hour)			
<b>Others</b>			
Overview Report (Chats, Messages & Visits)			
Auto Invitation Report			

Surveys Report (Custom Fields)			
Manual Invitation Report			
Canned Message Usage Report			
Goal Report			
Web Analytics Reports (Data from Google Analytics)			
Reports Subscription			
Report Export ( <a href="#">PDF</a> , <a href="#">CSV</a> , <a href="#">HTML</a> , <a href="#">XML</a> , <a href="#">Excel</a> )			
<b>Branding</b>			
Sticky, Fixed, Text & Email Signature Chat Button			
Mobile Friendly Chat Button			
Built-in Chat Button/Image Gallery			
Hide Chat Button When Offline			
Embedded & Popup Chat Window			
Deploy across Multiple Domains			
Customizable Chat Buttons			
Customizable Windows (Banner, Title)			
Multi-Brand Customization			
Multiple Languages			
Multiple Configuration Plans			
Remove "Powered By"			
Mobile Friendly Chat Window			
Operator Avatar			
Custom CSS			
<b>Internal Cooperation</b>			
Transfer Chat to Another Operator			
Operator Kickoff			
Chat with Other Operators			
Transfer Chat to a Department			
Invite Another Operator/Department to Join Chat			
Keep Operator Internal Chat Transcript			
Operator Group Chat			
<b>Security</b>			
SSL Encryption			
CAPTCHA Verification			
Password Policy			
IP Restriction			
Cross-Data-Center Redundancy			
Secure PCI Compliance Form			
Credit Card Masking (Credit Card Numbers Are Not Visible during Chats and Will Not Be Stored in the Archives)			
<b>Integrations</b>			
<b>Plugins</b>			
WordPress			
Joomla			
Shopify			
Magento			
Drupal			
Wix			
BigCommerce			
PrestaShop			

OpenCart			
<b>Integrations</b>			
Visitor Sign in with Facebook or Google+ Account			
Salesforce Integration			
Microsoft Dynamics CRM Integration			
Zoho Integration			
Zendesk Integration			
GotoMeeting Integration			
LogMeIn Integration			
Join.Me Integration			
Google Analytics Integration (Transmit Data to GA)			
<b>API &amp; SDK</b>			
API			
Mobile SDK			
Webhooks (Live Chat Solution Calls Your End Point When a Certain Event Happens)			
<b>Multi-Platform</b>			
Web App for Major Browsers			
Desktop App for Windows, Mac & Linux			
App for iPhone/iPad			
App for Android			

**APPENDIX F**  
**SAMPLE AGREEMENT**  
**BETWEEN SANTA FE COUNTY AND**  
**[NAME OF CONTRACTOR OR VENDOR]**

**THIS AGREEMENT** is made and entered into this \_\_\_\_\_ day of \_\_\_\_\_ 2021, by and between **SANTA FE COUNTY**, hereinafter referred to as the “County” and **[CONTRACTOR’S NAME]**, whose principal address is **[CONTRACTOR’S ADDRESS]** hereinafter referred to as the “Contractor”.

**WHEREAS**, the Santa Fe County

**WHEREAS**, pursuant to NMSA 1978 13-1-112, the County issued Request for Proposal (RFP) No. 2023-0023-AO/APS to solicit for Online Live and Chatbot Services; and

**WHEREAS**, the County determines the Contractor is the most qualified Offeror; and

**WHEREAS**, the County requires the services of the Contractor and the Contractor is willing to provide these services and both parties wish to enter into this Agreement.

**NOW, THEREFORE**, it is agreed between the parties:

**1. SCOPE OF WORK**

The Contractor shall provide, without limitation, the following services.

(Scope of Work from RFP)

**2. ADDITIONAL SERVICES**

A. The parties agree that all tasks set forth in Section 1 (Scope of Work), of this Agreement shall be completed in full, to the satisfaction of the County, in accordance with professional standards and for the amount set forth in Section 3 (Compensation, Invoicing and Set-off), of this Agreement, and for no other cost, amount, fee or expense.

B. The County may from time to time request changes in the scope of work to be performed hereunder. Such changes, including any increase or decrease in the amount of the Contractor’s compensation, which are mutually agreed upon by and between the County and the Contractor, shall be incorporated in a written amendment to this Agreement.

**3. COMPENSATION, INVOICING AND SET-OFF**

A. In consideration of its obligations under this Agreement the Contractor shall be compensated as described in Exhibit A Proposed Fee Schedule.

B. The Contractor shall submit a written request for payment to the County when payment is due under this Agreement. Upon the County's receipt of the written request, the County shall issue a written certification of complete or partial acceptance or rejection of the deliverables for which payment is sought.

- 1) The County's representative for certification of acceptance or rejection of contractual items and services shall be \_\_\_\_\_, or such other individual as may be designated in the absence of the County representative.
- 2) The Contractor acknowledges and agrees that the County may not make any payment hereunder unless and until it has issued a written certification accepting the contractual services or deliverables.
- 3) Within 30 days of the issuance of a written certification accepting the services or deliverables, the County shall tender payment for the accepted items or services. In the event the County fails to tender payment within 30 days of the written certification accepting the items or services, the County shall pay late payment charges of one and one-half percent (1.5%) per month, until the amount due is paid in full.

C. In the event the Contractor breaches this Agreement, the County may, without penalty, withhold any payments due the Contractor for the purpose of set-off until such time as the County determines the exact amount of damages it suffered as a result of the breach.

D. Payment under this Agreement shall not foreclose the right of the County to recover excessive or illegal payment.

#### **4. EFFECTIVE DATE AND TERM**

This Agreement shall, upon due execution by all parties, become effective as of the date first written above and shall terminate one year later, unless earlier terminated pursuant to Section 5 (Termination) or Section 6 (Appropriations and Authorizations). The County has the option to extend the term of this Agreement in one year increments not to exceed four years in total

#### **5. TERMINATION**

A. Termination of Agreement for Cause. Either party may terminate the Agreement based upon any material breach of this Agreement by the other party. The non-breaching party shall give the breaching party written notice of termination specifying the grounds for the termination. The termination shall be effective 30 days from the breaching party's receipt of the notice of termination, during which time the breaching party shall have the right to cure the breach. If, however, the breach cannot with due diligence be cured within 30 days, the breaching party shall

have a reasonable time to cure the breach, provided that, within 30 days of its receipt of the written notice of termination, the breaching party began to cure the breach and advised the non-breaching party in writing that it intended to cure.

B. Termination for Convenience of the County. The County may, in its discretion, terminate this Agreement at any time for any reason by giving the Contractor written notice of termination. The notice shall specify the effective date of termination, which shall not be less than 15 days from the Contractor's receipt of the notice. The County shall pay the Contractor for acceptable work, determined in accordance with the specifications and standards set forth in this Agreement, performed before the effective date of termination but shall not be liable for any work performed after the effective date of termination.

## **6. APPROPRIATIONS AND AUTHORIZATIONS**

This Agreement is contingent upon sufficient appropriations and authorizations being made for performance of this Agreement by the Board of County Commissioners of the County and/or, if state funds are involved, the Legislature of the State of New Mexico. If sufficient appropriations and authorizations are not made in this or future fiscal years, this Agreement shall terminate upon written notice by the County to the Contractor. Such termination shall be without penalty to the County, and the County shall have no duty to reimburse the Contractor for expenditures made in the performance of this Agreement. The County is expressly not committed to expenditure of any funds until such time as they are programmed, budgeted, encumbered and approved for expenditure by the County. The County's decision as to whether sufficient appropriations and authorizations have been made for the fulfillment of this Agreement shall be final and not subject to challenge by the Contractor in any way or forum, including a lawsuit.

## **7. INDEPENDENT CONTRACTOR**

The Contractor and its agents and employees are independent contractors and are not employees or agents of the County. Accordingly, the Contractor and its agents and employees shall not accrue leave, participate in retirement plans, insurance plans, or liability bonding, use County vehicles, or participate in any other benefits afforded to employees of the County. Except as may be expressly authorized elsewhere in this Agreement, the Contractor has no authority to bind, represent, or otherwise act on behalf of the County and agrees not to purport to do so.

## **8. ASSIGNMENT**

The Contractor shall not assign or transfer any interest in this Agreement or assign any claims for money due or to become due under this Agreement without the advance written approval of the County. Any attempted assignment or transfer without the County's advance written approval shall be null and void and without any legal effect.

## **9. SUBCONTRACTING**

The Contractor shall not subcontract or delegate any portion of the services to be performed under this Agreement without the advance written approval of the County. Any attempted subcontracting or delegating without the County's advance written approval shall be null and void and without any legal effect.

**10. PERSONNEL**

A. All work performed under this Agreement shall be performed by the Contractor or under its supervision.

B. The Contractor represents that it has, or will secure at its own expense, all personnel required to discharge its obligations under this Agreement. Such personnel (i) shall not be employees of or have any contractual relationships with the County and (ii) shall be fully qualified and licensed or otherwise authorized or permitted under federal, state, and local law to perform such work.

**11. RELEASE**

Upon its receipt of all payments due under this Agreement, the Contractor releases the County, its elected officials, officers, agents and employees from all liabilities, claims, and obligations whatsoever arising from or under or relating to this Agreement.

**12. CONFIDENTIALITY**

Any confidential information provided to or developed by the Contractor in the performance of this Agreement shall be kept confidential and shall not be made available to any individual or organization by the Contractor without the prior written approval of the County.

**13. PUBLICATION, REPRODUCTION, AND USE OF MATERIAL; COPYRIGHT**

A. The County has the unrestricted right to publish, disclose, distribute and otherwise use, in whole or in part, any reports, data, or other material prepared under or pursuant to this Agreement.

B. The Contractor acknowledges and agrees that any material produced in whole or in part under or pursuant to this Agreement is a work made for hire. Accordingly, to the extent that any such material is copyrightable in the United States or in any other country, the County shall own any such copyright.

**14. CONFLICT OF INTEREST**

The Contractor represents that it has no and shall not acquire any interest, direct or indirect, that would conflict in any manner or degree with the performance of its obligations under this Agreement.

**15. NO ORAL MODIFICATIONS; WRITTEN AMENDMENTS REQUIRED**

This Agreement may not be modified, altered, changed, or amended orally but, rather, only by an instrument in writing executed by the parties hereto. The Contractor specifically acknowledges and agrees that the County shall not be responsible for any changes to Section 1 (Scope of Work), of this Agreement unless such changes are set forth in a duly executed written amendment to this Agreement.

**16. ENTIRE AGREEMENT; INTEGRATION**

This Agreement incorporates all the agreements, covenants, and understandings between the parties hereto concerning the subject matter hereof, and all such agreements, covenants and understandings have been merged into this written Agreement. No prior or contemporaneous agreement, covenant or understandings, verbal or otherwise, of the parties or their agents shall be valid or enforceable unless embodied in this Agreement.

**17. NOTICE OF PENALTIES**

The Procurement Code, NMSA 1978, Sections 13-1-28 through 13-1-199, imposes civil and criminal penalties for its violation. In addition, New Mexico criminal statutes impose felony penalties for bribes, gratuities, and kickbacks.

**18. EQUAL EMPLOYMENT OPPORTUNITY COMPLIANCE**

A. The Contractor agrees to abide by all federal, state, and local laws, ordinances, and rules and regulations pertaining to equal employment opportunity and unlawful discrimination. Without in any way limiting the foregoing general obligation, the Contractor specifically agrees not to discriminate against any person with regard to employment with the Contractor or participation in any program or activity offered pursuant to this Agreement on the grounds of race, age, religion, color, national origin, ancestry, sex, physical or mental handicap, serious medical condition, spousal affiliation, sexual orientation, or gender identity.

B. The Contractor acknowledges and agrees that failure to comply with this Section shall constitute a material breach of this Agreement.

**19. COMPLIANCE WITH APPLICABLE LAW; CHOICE OF LAW**

A. In performing its obligations hereunder, the Contractor shall comply with all applicable laws, ordinances, and regulations.

B. Contractor shall comply with the requirements of Santa Fe County Ordinance 2014-1 (Establishing a Living Wage).

C. This Agreement shall be construed in accordance with the substantive laws of the State of New Mexico, without regard to its choice of law rules. Contractor and the County agree

that the exclusive forum for any litigation between them arising out of or related to this Agreement shall be state district courts of New Mexico, located in Santa Fe County.

## **20. RECORDS AND INSPECTIONS**

A. To the extent its books and records relate to (i) its performance of this Agreement or any subcontract entered into pursuant to it or (ii) cost or pricing data (if any) set forth in this Agreement or that was required to be submitted to the County as part of the procurement process, the Contractor agrees to (i) maintain such books and records during the term of this Agreement and for a period of six years from the date of final payment under this Agreement; (ii) allow the County or its designee to audit such books and records at reasonable times and upon reasonable notice; and (iii) to keep such books and records in accordance with generally accepted accounting principles (GAAP).

B. To the extent its books and records relate to (i) its performance of this Agreement or any subcontract entered into pursuant to it or (ii) cost or pricing data (if any) set forth in this Agreement or that was required to be submitted to County as part of the procurement process, the Contractor also agrees to require any subcontractor it may hire to perform its obligations under this Agreement to (i) maintain such books and records during the term of this Agreement and for a period of six years from the date of final payment under the subcontract; (ii) to allow the County or its designee to audit such books and records at reasonable times and upon reasonable notice; and (iii) to keep such books and records in accordance with GAAP.

## **21. INDEMNIFICATION**

A. The Contractor shall defend, indemnify, and hold harmless the County and its elected officials, agents, and employees from any losses, liabilities, damages, demands, suits, causes of action, judgments, costs or expenses (including but not limited to court costs and attorneys' fees) resulting from or directly or indirectly arising out of the Contractor's performance or non-performance of its obligations under this Agreement, including but not limited to the Contractor's breach of any representation or warranty made herein.

B. The Contractor agrees that the County shall have the right to control and participate in the defense of any such demand, suit, or cause of action concerning matters that relate to the County and that such suit will not be settled without the County's consent, such consent not to be unreasonably withheld. If a conflict exists between the interests of the County and the Contractor in such demand, suit, or cause of action, the County may retain its own counsel to represent the County's interest.

C. The Contractor's obligations under this section shall not be limited by the provisions of any insurance policy the Contractor is required to maintain under this Agreement.

## **22. SEVERABILITY**

If any term or condition of this Agreement shall be held invalid or non-enforceable by any court of competent jurisdiction, the remainder of this Agreement shall not be affected and shall be valid and enforceable to the fullest extent of the law.

**23. NOTICES**

Any notice required to be given to either party by this Agreement shall be in writing and shall be delivered in person, by courier service or by U.S. mail, either first class or certified, return receipt requested, postage prepaid, as follows:

To the County:                    Santa Fe County Departments  
    102 Grant Avenue  
    Santa Fe, NM 87501

To the Contractor:            **[CONTRACTOR’S NAME AND ADDRESS]**

**24. CONTRACTOR’S REPRESENTATIONS AND WARRANTIES**

The Contractor hereby represents and warrants that:

A.        This Agreement has been duly authorized by the Contractor, the person executing this Agreement has authority to do so, and, once executed by the Contractor, this Agreement shall constitute a binding obligation of the Contractor.

B.        This Agreement and Contractor’s obligations hereunder do not conflict with Contractor’s corporate agreement or any statement filed with the New Mexico Secretary of State on Contractor’s behalf.

C.        Contractor is legally registered and is properly licensed by the State of New Mexico to provide the services anticipated by this Agreement and shall maintain such registration and licensure in good standing throughout the duration of the Agreement.

**25. FACSIMILE SIGNATURES**

The parties hereto agree that a facsimile signature has the same force and effect as an original for all purposes.

**26. NO THIRD-PARTY BENEFICIARIES**

This Agreement was not intended to and does not create any rights in any persons not a party hereto.

**27. INSURANCE**

A.        General Conditions. The Contractor shall submit evidence of insurance as is required herein. Policies of insurance shall be written by companies authorized to write such insurance in New Mexico.

B. General Liability Insurance, Including Automobile. The Contractor shall procure and maintain during the life of this Agreement a comprehensive general liability and automobile insurance policy with liability limits in amounts not less than \$1,000,000.00 combined single limits of liability for bodily injury, including death, and property damage for any one occurrence. Said policies of insurance shall include coverage for all operations performed for the County by the Contractor; coverage for the use of all owned, non-owned, hired automobiles, vehicles and other equipment, both on and off work; and contractual liability coverage under which this Agreement is an insured contract. Santa Fe County shall be a named additional insured on the policy.

C. Increased Limits. If, during the life of this Agreement, the Legislature of the State of New Mexico increases the maximum limits of liability under the Tort Claims Act (NMSA 1978, Sections 41-4-1 through 41-4-29, as amended), the Contractor shall increase the maximum limits of any insurance required herein.

## **28. PERMITS, FEES, AND LICENSES**

Contractor shall procure all permits and licenses, pay all charges, fees, and royalties, and give all notices necessary and incidental to the due and lawful performance of its obligations hereunder.

## **29. NEW MEXICO TORT CLAIMS ACT**

No provision of this Agreement modifies or waives any sovereign immunity or limitation of liability enjoyed by County or its “public employees” at common law or under the New Mexico Tort Claims Act, NMSA 1978, Section 41-4-1, et seq.

## **30. CAMPAIGN CONTRIBUTION DISCLOSURE FORM**

The Contractor agrees to compute and submit simultaneous with execution of this Agreement a Campaign Contribution Disclosure form approved by the County.

## **31. APPOINTMENT OF AGENT FOR SERVICE OF PROCESS**

The Contractor hereby irrevocably appoints [NAME AND ADDRESS OF AGENT], as its agent upon whom process and writs in any action or proceeding arising out of or related to this Agreement may be served. The Contractor acknowledges and agrees that service upon its designated agent shall have the same effect as though the Contractor were actually and personally served within the state of New Mexico.

## **32. SURVIVAL**

The provisions of following paragraphs shall survive termination of this Agreement; INDEMNIFICATION; RECORDS AND INSPECTION; RELEASE, CONFIDENTIALITY, PUBLICATION, REPRODUCTION, AND USE OF MATERIAL; COPYRIGHT; COMPLIANCE

WITH APPLICABLE LAW; CHOICE OF LAW; NO THIRD-PARTY BENEFICIARIES; and SURVIVAL.

**IN WITNESS WHEREOF**, the parties have duly executed this Agreement as of the date of last signature by the parties hereto.

**SANTA FE COUNTY**

\_\_\_\_\_  
Gregory S. Shaffer  
County Manager

\_\_\_\_\_  
Date

Approved as to form

\_\_\_\_\_  
Jeff Young  
County Attorney

\_\_\_\_\_  
Date

Finance Department

\_\_\_\_\_  
Yvonne S. Herrera  
Finance Director

\_\_\_\_\_  
Date

**CONTRACTOR:**

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
Date

\_\_\_\_\_  
(Print name & title)