



Request for Proposal (RFP) for  
Records Management Software (RMS)

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## TABLE OF CONTENTS

1	Introduction and Intent	3
2	Background and Overview	3
3	Scope of Services	4
4	Minimum Qualifications	18
5	Preparing a Response	18
A.	Questionnaire.	19
B.	Project Understanding / Approach and Relevant Experience	20
C.	Fee Proposal.	20
D.	Insurance.	20
E.	Additional Required Data.	20
6	Questions	21
7	RFP General Terms and Conditions	21
A.	Acceptance or Rejection by the Capitol Region Council of Governments	21
B.	Ownership of Proposals	21
C.	Changes to Proposals	21
D.	Contract Requirements	22
E.	Amending or Canceling Request	22
F.	Waiver of Informalities	22
G.	Collusion	22
H.	Assigning/ Transferring of Agreement	22
I.	Termination	22
J.	Severability	22
K.	Affirmative Action	22
L.	Insurance Requirements	23
M.	Hold Harmless and Indemnification	24
8	RFP Evaluation and Selection Process	24

## **1 INTRODUCTION AND INTENT**

CRCOG, on behalf of its municipalities, seeks proposals from qualified and experienced vendors to provide a cloud-based (preferred) medical and fire software reporting system for the purpose of collecting and reporting data related to diverse emergency services organizations that meets federal and industry standard reporting requirements and the ability to identify flaws for system improvements. With multiple emergency services utilizing an extensive Records Management System (RMS), any on premise solution presented must have acceptable web-hosting services to allow connectivity between the agencies' RMS members and their database locations corresponding dispatch centers.

The software is expected to be user-friendly, delivering maximum benefits, and easy-to-input data and to manage and retrieve information for budget analysis, decision-making, reporting and document archiving, and meet the requirements specified in the Scope of Work within this Request for Proposals (RFP). An award will be made to the vendor that demonstrates experience and expertise in designing and conducting the training, proposes reasonable fees for each module option, and meets the requirements of this RFP.

It is CRCOG's intent to award a contract for a 3-year term, with options for additional extensions. CRCOG will hold the master contract and CRPC members will participate in the program via member side letters (Appendix A). All vendors proposing must agree to honor the same pricing for departments that may already have your products and the terms and conditions as set forth herein.

## **2 BACKGROUND AND OVERVIEW**

The Capitol Region Council of Governments (CRCOG) is a voluntary Council of Governments formed to initiate and implement regional programs of benefit to the towns and the region. It is guided by the chief elected officials of our 38 Metro Hartford municipalities. The mayors, first selectmen, and town council chairmen who make up our governing Policy Board recognize that the future of our individual members is tied to the future of our region. Our members have collaborated for more than 50 years on a wide range of projects to benefit our towns individually and the region as a whole. CRCOG serves the Capitol Region and all our municipalities by:

- Helping members improve governmental efficiency and save tax dollars through shared services and other direct service initiatives;
- Promoting efficient transportation systems, responsible land use and preservation of land and natural resources and effective economic development;
- Strengthening the Capitol Municipality of Hartford as the core of a strong region, and as our economic, social and cultural center;
- Advocating for the region and its towns with the State and Federal governments;

## RFP: Fire/EMS Records Management Software (RMS)

- Strengthening our regional community by helping coordinate regional agencies and programs; and
- Assisting local governments and citizens in articulating, advocating, and implementing the vision, needs and values of their regional community.

### 3 SCOPE OF SERVICES

The Vendor will be expected to provide a medical and fire reporting software system. Overall, CRCOG is seeking a customizable plan to meet the needs of CRCOG's member towns and the Capitol Region Purchasing Council Member Towns.

Each town who utilizes the vendor will have a variety of needs and goals.

The selected vendor will provide emergency reporting software that includes the following:

#### General

Vendor shall provide a reporting software to collect data and report data related to diverse emergency services organizations and must allow for data reporting and analysis intended to report on system effectiveness and help pinpoint flaws for system improvements.

Software specific requirements include:

- Functions in a browser or installed program and the ability to input in an offline mode use.
- Store data with the ability to connect and upload to the web when data connection is available.
- Must allow staff to enter or edit location, occupant, and inspection records while offline and working in the field.
- Ability to synchronize all data bidirectional with web-based program, is preferred.
- Allow full integration with CAD for all modules and programs to better understand integration with various CAD systems. **NOTE: Please provide a list of your Application Programming Interface (API's) and products they can communicate with, in your proposal. i.e., Nexgen, Motorola, lamResponding (laR), CrewForce, etc.**

#### **Data Conversion capabilities to multiple software programs**

The vendor shall provide a data conversion process for all legacy Fire RMS data. Options shall be provided for full, partial, and other methodologies to retain and access the current data. The software should include the following:

- Ability to convert current data into new RMS system across multi-jurisdictions.

## RFP: Fire/EMS Records Management Software (RMS)

- Fully integrated Fire and/or EMS RMS providing single point data entry and subsequent sharing of the data across all modules.
- Provide options to access the legacy RMS data including complexity, risk, level of effort, price, and value. *For example: Is converting all legacy data in its entirety into the new RMS system a viable option or is it price/level of effort prohibitive?*
  - At a minimum, CRCOG's preference (not requirement) is that all legacy information can be retrieved via a legacy data warehouse system. i.e., SQL, Oracle, Flat file, Access, etc.

### **Other options:**

Provide a detailed data conversion and archiving legacy data plan that describes all Local Fire Departments processes and activities required to successfully migrate relevant data into the proposed solution. The plan should include the following:

- The proposed solution for data conversion and data warehousing processes
- Specific functionality and features (e.g., precise information how would we access the historical converted or warehoused data)
- A description of the proposed automated data conversion tools
- Recommended solutions for end-users to access non-migrated legacy data via integrated system or separate queries
- Recommended storage location for non-migrated legacy data
- Describe the data conversion process

### **Ability to set security levels for different users**

Software shall provide:

- Role Based Access Control: Ability to assign authorized user specific permissions (rights/roles as defined by security level clearance) to perform a CAD/RMS function.
- A high-level of availability, security, and reliability. Security authorizations can be assigned by individuals and by groups.
- Auditing of any reporting changes.
- Compliance for logins. i.e., password changing policies and minimums, max number of wrong passwords exceeding login attempt, inactivity timeouts, etc.

### **Multiple Licenses**

Vendor shall provide their licensing model and whether it is by user, by department, by apparatus etc. and associated costs.

- a cost-effective solution for multiple agencies and users.

### **Ability to Conduct Analytics**

The software shall provide the following:

## RFP: Fire/EMS Records Management Software (RMS)

- Reports and the ability for users to create and share reports that can be exported/available in common file types like PDF, Word, Excel etc. and unique to their agency.
- Provide configurable dashboards, describe the proposed architecture, and network connectivity requirements.

### **Generate reports and queries**

Must be able to perform the following functions:

- Allow agencies and users to send reports (e.g., email, fax, etc.) with proper permissions to create, store and manage custom reports, and schedule reports on a daily, weekly, annual, etc. basis.
- Export and import data from other analytical tools; create and/or modify reports for specific outcomes.
- Search and query data, NFPA, ISO and Accreditation reports.
- Support the ability to print agency logos on all reports and forms.
- Allow data and reports to be exported to Microsoft products such as Word, PDF, and Excel.
- Generate notification letters, courtesy notices, and other defined forms based on analytical processes or transactions processed.
- Allow agencies to track firefighter injuries and exposure (incident and non-incident related) and allow agency specific form utilizing data such as HIPAA or other consent forms.
- Generate agency specific forms such as patient refusal, HIPAA Notice of Privacy Practices, Physician Authorization Certification (PAC) and patient consent forms that allow the capture of hand-written electronic signatures.

### **Multiple Support Modules**

The software shall:

- Consist of a fully integrated Fire/EMS RMS providing single point data entry, collection, and forms creation, and subsequent sharing of the data across all modules.

### **Pre Plans (including Tier II)**

The software shall provide the ability to operate in offline mode and perform the following:

- Enter and track building occupancies for inspections, permitting and other reporting requirements. (building construction, fire protection, contact information, Hazardous Materials, etc.)

## RFP: Fire/EMS Records Management Software (RMS)

- Access to Hazardous Materials chemical information, synonyms, trade names and material safety data sheets and provide a process to input and manage Hazardous Materials locations with all associated reference data.
- Identify all property with Knox boxes and its location on the property.
- Integrate with the CRCOG GIS system for all location and address validation and interface with CAD for 'Call for Service' data and locations.
- Maintain records of past call history associated with specific addresses.
- Create and manage preplans and site plans. (The plans should be integrated with CAD and not require rekeying or requesting of data.)
- Provide required calculations for fire flow for pre-plans and Tier II.
- Identify special Needs List/information and identify health related alerts for specific patients.

### **Hydrants**

The software shall provide an integrated process to manage hydrants, including the following:

- Allow users to track and monitor the service status of all hydrants including water flow ability.
- Provide the ability to display each hydrant on the map and indicate the status of the hydrant by color.
- Changes in hydrant service status should result in a change in response plans for the incident which will be user defined.
- Provide a user-defined notification regarding alternate water supplies to users and closest Fire Station based on a geographically based radius.

### **Staffing (Scheduling/Administrative employee information)**

The software shall provide an integrated staffing and scheduling application *or will allow for* use of API's to existing programs, and will be capable of the following:

- Sharing data with applications like Crew Sense or Halligan to supplement modules.
- Enter and maintain personnel information such as scheduling and skills.
- Accommodate multiple schedule patterns; render graphical display of shift rosters by day and shift hour, and easily identify days with shortages or overages graphically on a monthly calendar.
- Perform daily scheduling and assignments/roster; offers station and/or unit manning requirements and filling recommendations, and Create rosters and shift schedules by individual, company, station, battalion, or division.
- Input and maintain data on personnel, including personnel photo.
- Link or extract data from administrative personnel system (Active Directory).

## RFP: Fire/EMS Records Management Software (RMS)

- Input and maintain current and past assignments.
- Offer personnel fill in/position recommendations and/or cross manning recommendations.
- Track swaps/exchange of duty and keep history of changes.
- View or print: monthly and yearly schedules and changes by station, groups and individuals based on security.
- Track personnel leave, vacation, and sick time, or user defined time.
- Function in a manual mode in case of failure of staffing module or other problem.
- Functionality to automatically populate from the roster fields in other modules with personnel assigned to given units, stations, battalions, or special assignments (i.e., NFIRS, NEMESIS, training, etc.).
- Manage personnel movement and coverage.
- Track pay and work status codes.

### **Training**

The software shall provide ability for the following:

- Full function training module to include personnel, training, and certifications.
- Create, manage, track, modify credentials and re-certification requirements for department personnel.
- Develop task books or development plans for personnel based on department policies and requirements.
- Develop training activities including video and audio presentations, document review, and examination, and access to a training activity library.
- Assign training activities to specific groups and individuals and run reports detailing training records and credentials for all department personnel; attach entered training records to employee personnel records.
- Store images of certification documents (PDFs, JPEG, etc.).
- Track training class scheduling, instructors, class size and registrants, course results, location, topic and length of class, including training certifications and recertifications by individual.
- Prompt notifications when certifications are due to expire, allowing supervisors ability to view certifications based on security.
- Display scheduled courses on a calendar.
- System records instructor time to apply toward certification requirements.
- Allow personnel to post and enroll in available training classes electronically via the RMS.



## RFP: Fire/EMS Records Management Software (RMS)

- Ability to create, use and attach questionnaire forms in conjunction with Roll Call training and/personnel evaluations.
- Ability to integrate with calendars such as google, outlook, etc. is preferred.

### **Training Plan for the RMS Platform**

The vendor shall provide the ability to/for:

- Training for employees and an on-site training coach for a negotiated time, such as (3) days touching all the fire department shifts.
- Utilize a 'Train the Trainer' (TTT) approach for the RMS application training. (Due to public safety shifts, training courses will need to be scheduled outside of normal working hours including weekends.)
- Train personnel using the proposed systems while in production mode. *For example, applications should have a training module allowing personnel to use the application while it is in production/operation.*

### **Non-Training Events**

The software shall have the ability to:

- Schedule and track activities that are not related to Calls for Service. (These activities would be in addition to those associated with inspections or training i.e., meetings, public education, station work, tours.)
- Create, schedule, manage tasks for users, units, special events, or other defined segments.
- Manage a "to do list" that can be filtered to individuals, units, stations, or battalions.

### **Fire Investigations**

The software shall provide a full function fire investigations module, including:

- Ability to document an investigation from the initial incident to the conclusion of the case.
- Ability to link/integrate with NFIRS incident, building, businesses, persons, and other related cases.

### **Inventory**

The software shall:

- Provide a full function inventory and asset tracking module: class, type, description, unit, budget amount per item, cost, make, model, quantity, location, division, status, remarks, serial number, assigned to, date assigned, motor vehicle number at minimum.

## RFP: Fire/EMS Records Management Software (RMS)

- Provide a link to the personnel module and shall integrate with CAD for personnel and units' assignment and capability tracking.
- Provide auto review date for routine maintenance, required testing or disposal.
- Track the inventory and assignment vehicles; ability to query history of vehicles.
- Schedule and track vehicle maintenance, repairs and testing, either in-house or outside vendor performed services, and maintain service history.
- Provide auto review date for routine maintenance and updates on unit maintenance required in the fleet maintenance module.
- Track, distribute, and maintain equipment, supplies, uniforms, and record equipment assignment; assign inventory to personnel, apparatus, and stations.

### **Equipment (Turnout, and SCBA Inspection / Testing, Station, Uniform, and Supplies)**

The software shall link personnel with assigned equipment.

The software shall allow the entry and detailed records of all department specific equipment.

The software shall allow:

- Creation of categories and types of equipment.
- Automated threshold reports and processes to create automated inventory replacement and generate reorder threshold reports.
- Provide a thorough inquiry and reporting system, an integrated barcode process for all functions, and an integrated signature capture process.
- Ability to link the personnel module to the equipment module for all assigned equipment and maintain a history of all equipment.
- Ability to enter and maintain detailed records on all department specific equipment and create and maintain department-defined equipment categories.
- Ability to create and maintain records about agency's inventory items, such as the item number, item name, use type, category, agency cost, usage times, measurement type, manufacturer, vendors, etc.
- Ability to create and maintain supply records, by which supply items can be added to the inventory system, which contain general information such as lot number, batch number and expiration date, as well as usage and supply area information.
- Ability to execute a search for supplies and limit the search to specific user-defined criteria, such as use type, supply area, vendor, item, and more.
- Ability to generate multiple inventory related reports.
- Ability to track hose inventory and hose testing.
- Ability to schedule preventive maintenance, repairs and testing, and maintain service history and allow for quick access to location and batch testing.

## RFP: Fire/EMS Records Management Software (RMS)

- Ability to automatically flag which hoses are scheduled for testing and provides assigned location.
- Ability to easily check and update inventory on-hand amounts.
- Ability to track Turnout gear, SCBA, Hose, Pump Testing, Appliance Inspections, and Apparatus Checks (log testing) by:
  - Department
  - Personnel
  - Division
  - Unit
  - Vehicle
  - Location
- Capture equipment issued and returned dates and capture equipment condition when assigned to personnel and when returned and who issued equipment.
- Ability to capture equipment purchase information, such as purchase date, the name of the individual from whom an equipment item was purchased, P.O. number, and retail and original cost.
- Ability to update personnel files with issued equipment.
- Ability to schedule equipment for department-specific maintenance.
- Ability to associate with department-specific inventory number.
- Ability to capture and report by equipment serial number.
- Ability to create and maintain department-specific equipment activities (maintenance).
- Ability to enter and schedule department-specific equipment related activities.
- Ability to track complete equipment history.
- Ability to attach multiple and various supporting documents to equipment records.
- Ability to integrate Barcode reader for equipment tracking

### **Inspections**

The software shall provide an integrated inspections module allowing for the following:

- Ability to schedule inspection related activities, assign these to individuals or fire companies on varying cyclic timetables which are sent out automatically.
- Seamless integration of adopted IFC and local amendments.
- Ability to track inspections and violations; history of all inspections and violations for the occupancies should be maintained.
- Ability to create histories of past occupancies at the same location and track all pertinent related activities and contacts.
- System provides individual property registration and full systems registration in conjunction with performing inspections.

## RFP: Fire/EMS Records Management Software (RMS)

- System provides Inspections property history tracking and Inspection and re - inspection scheduling.
- Inspections can be completed on tablet device with real -time updates to server and full access to information about specific property from server.
- System accommodates remote inspections.
- Ability to track state and local violations; allows violation tracking based on inspections.
- Ability to print department inspection forms in and inspection violations in PDF format.
- Ability to bill for inspections, registrations, and violations.
- System provides permit tracking, printing, and billing.
- Ability to attach photos and scanned documents to inspection record.
- Ability to maintain property hazard flags and hazardous materials locations.
- Hazard flags from inspections are displayed in CAD as incident is entered and available in an app for responders to view.
- Ability to access all property registration information at CAD or on an app.

### Reports

- The software shall provide a full function reporting module that shall integrate with municipalities/members Business Analytics module.
- System provides Report Entry and Report Approval process (Quality Check).
- Ability to interrupt record entry process and continue at a later time.
- Ability to print a report once record entry is completed.
- Ability to print unapproved reports with a marked "draft."
- Ability to return unapproved report with correction comments.
- System provides full word processing capabilities in report entry including spell check through default and customized dictionaries.
- System provides all desktop report functions match mobile report entry functions including NFIRS 5.0 reports.
- System conforms to state and federal reporting standards for all fields and codes.
- System provides conflict resolution before actual update of database if multiple reports are completed.
- Ability of supervisors to view and approve reports from mobile units.
- Ability to lock reports upon final approval and submission.
- Ability to allow edits/changes and track submission of changed files.
- System provides the following reports/forms including but not limited to: Basic, Fire, Structure Fire, Civilian Fire Casualty, Fire Service Casualty, EMS, Hazardous

## RFP: Fire/EMS Records Management Software (RMS)

Materials, Wildland Fire, Apparatus or Resources, Personnel, Arson, Juvenile Firestarter, Supplemental.

- Ability to enter and maintain evidence including the association of the firefighter's name and the item.
- Ability to provide printable report to the public.

### **ePCR for EMS (NEMESIS 3 compliant) HIPAA compliant**

- The software shall provide ePCR for EMS and be Connecticut Office of Emergency Medical Services (OEMS) compliant, including any needed software updates.
- System supports CAD to RMS interface for reduction of data entry of information such as: reported location, times, comments, names, units responding at minimum.
- Ability to fill EMS forms and record it as part of the incident.
- System supports interface to patient charting software; complies with federal and state adopted standards; ability to submit information electronically.
- Ability to attach photos or scanned documents to EMS records.
- Supports ePCR and NEMESIS.
- Ability to accept data from cardiac monitors, etc.
- Ability to integrate with hospital records systems for continuity and outcome reporting measures.
- Ability to maintain separate databases for 911 and non-911 records.
- NFIRS (Public Fire Reports) Compatibility with CAD system
- The software shall provide complete NFIRS reporting.
- Ability to generate an incident from CAD in real time. Ability to interface with CAD in real time to transfer incident information and unit information.
- Ability to have an address validation process that is consistent and uses the same data sources for the whole RMS. Ability to have an approval/lock/rejection process for all incidents (including different approval levels, routing, notification, and correction process).
- Ability to have a data validation process for NFIRS compliance.
- Provide workflow, guided data entry, checklist tools used to help create an incident and ensure all required items are included.
- Ability to route incidents for QA\QI and supervisor approval.
- Ability to allow users to view incidents and statuses using a dashboard or other interactive process.
- Ability to imbed standard operating procedures and policies into incidents.
- Full integration with EMS patient care reporting.

## RFP: Fire/EMS Records Management Software (RMS)

- Ability to export NFIRS data to the State of Connecticut using their most current format.
- System provides Report Entry and Report Approval process (Quality Check).
- Ability to interrupt record entry process and continue at a later time.
- Ability to print a report once record entry is completed.
- Ability to print unapproved reports with a marked “draft”.
- Ability to return unapproved report with correction comments.
- System provides full word processing capabilities in report entry including spell check through default and customized dictionaries.
- System provides all desktop report functions match mobile report entry functions including NFIRS 5.0 reports.
- System conforms to state and federal reporting standards for all fields and codes.
- System provides conflict resolution before actual update of database if multiple reports are completed.
- Ability of supervisors to view and approve reports from mobile units.
- Ability to lock reports upon final approval and submission.
- Ability to allow edits/changes and track submission of changed files.
- System provides the following reports/forms including but not limited to: Basic, Fire, Structure Fire, Civilian Fire Casualty, Fire Service Casualty, EMS, Hazardous Materials, Wildland Fire, Apparatus or Resources, Personnel, Arson, Juvenile Firestarter, Supplemental.
- Ability to enter and maintain evidence including the association of the firefighter’s name and the item.
- Ability to provide printable/pdf public fire reports.

### **Risk Assessment or Community Risk Reduction**

- Ability to document Risk Assessments and Community Risk Reduction (CRR) to identify and prioritize local risks, followed by the integrated and strategic investment of resources (emergency response and prevention) to reduce their occurrence and impact.

### **Convert data into Geographic Intelligence**

- Ability to convert data into GIS integration for address validation/mapping.

### **Export data out to message boards**

- Ability to support a messaging system that can transmit messages to workstation/monitors in designated areas preferably the fire stations.

### **RMS Utilization**

- The software shall provide the ability to switch users on the same/shared devices.
- Has the ability the messaging capabilities within RMS and what data can be included in those messages.
- Has the ability to integrate email, messaging and FAX or other communications into daily operations. *Example: FAX PCR Reports to hospitals, send an email to a business notifying them of their inspection results.*

### **Configuration**

- The software shall provide the ability for each agency to configure data entry fields or workflows.
- Ability to customize data entry fields.
- The software shall users to add user defined fields to screens.
- The software shall allow users to customize data elements.
- Ability to customize attributes related to existing or user-defined fields.

### **Code Tables**

- The software shall provide code tables for validation of all entries and the ability to use code tables with unique identifiers.
- Possible values and descriptors should be easy to access and select.
- Ability to view, add, modify, and delete codes in tables and limit access to such rights through security.

### **Data Validation**

- The software shall provide the ability for agencies to create their own logic rules for defined elements.
- Ability to validate fields with user defined business rules.
- Ability to apply logic rules to dependent fields.
- Ability to note by visual clue mandatory and advisory fields.
- Ability to alert for missing data or incorrect data.
- Ability to limit valid field entry options based on previously entered data.

### **Narratives**

- The software shall provide a full featured narrative process for all data elements that allow text entry.
- The software shall maintain an audit trail of all entries and updates.
- The software shall provide an automatic save of based on agency rules.

## RFP: Fire/EMS Records Management Software (RMS)

- The software shall redact data while providing a positive audit of change.
- Ability to lock all narrative/free text fields when opened by a user for editing; no two users should be allowed to edit a narrative/free text field at the same time.
- When any narrative/free text field is being modified, provide view-only access to other users attempting to modify/look at the same record; provide message/warning window on display.
- All narrative/free text fields should have spell check and text formatting capabilities.
- Save the narrative/free text fields when closing the editing window and/or when 'Save' is initiated.
- Auto-save all data and narrative/free text fields periodically to prevent loss from interruptions.
- Function to add a date/time, user ID, and console ID stamp when a narrative is modified.
- Redact information inserted by a reviewer, to include an annotation of why the redaction was made.
- Load customized dictionaries and create customized narrative templates.

### **Audit**

- The software shall provide a detailed reporting process and audit trail of all changes made to the system to Administrators.
- Include the user identifier, fields, the action performed (add, change, delete), data before and after change, a date/time stamp.
- Ability to provide audit logs in a usable fashion for authorized user, so they can be reviewed, analyzed, printed, and archived.
- Ability to view an audit log based on the security level assigned to each auditable feature, report, or activity, which is assigned to each user by the System Administrator.

### **EMS**

- The software shall provide full ePCR capability.
- The software shall provide integration to NFIRS reporting and CAD Calls for Service.
- The system shall provide full HIPAA security for all transactions.
- The systems shall provide tracking, narcotic usage and management of all associated applications.
- The systems shall provide guided data entry for all functions.
- Ability to create ePCR's associated with corresponding NFIRS incidents.
- Compliant with HIPAA regulations and managed with appropriate security levels.



## RFP: Fire/EMS Records Management Software (RMS)

- Ability to interface with CAD to transfer incident information, EMD Determinant Code and unit information.
- Ability to interface with staffing modules to transfer personnel assignments.
- Ability to transfer EMS certification levels from personnel module.
- Ability to support driver license readers.
- Ability to track past patient contacts and use the data to populate appropriate fields (repeat patients).
- Ability to handle customized dictionaries.
- To interface with agency protocols published on the web.
- Ability to perform daily narcotic logging.
- Ability to track controlled substance wastage.
- Ability to interface with medical monitoring equipment to auto-populate appropriate fields and attach image files (EKG model Lifepak 15 and LUCAS).
- Ability to generate agency specific forms such as refusal, HIPAA NPP, Physician Authorization Forms (PCS) and consent forms that allow the capture of hand-written electronic signatures.
- Ability to validate data upon entry for NEMSIS 3 compliance.
- Provides workflow, guided data entry, checklist tools used to help create ePCR and ensure all required items are included.
- Ability to have an approval/lock/rejection process for all ePCR's (including different approval levels, routing, notification, and correction process).
- Ability to route ePCR's for QA/QI.
- Ability to transmit the ePCR via fax.
- Ability to interface with local hospitals to receive patient's outcome data.
- Ability to support an ambulance subscription/membership program.
- Ability to generate ePCR exports for NEMSIS and billing.
- Ability to implement CQI processes.
- Ability to implement a field internship program.
- Ability to transfer NFIRS/ePCR data to external fire/EMS agencies with compatible RMS systems.
- Ability to capture transport mileage.
- Ability to be customizable for various reports (Neonatal ICU transports, Blood Draws, etc.).
- Ability to maintain separate databases for 911 and non-911 reports.
- The software shall provide NFIRS, EMS, and Inspections capabilities on the MDC.
- The software shall provide scheduling and staffing interactive from an MDC.

## RFP: Fire/EMS Records Management Software (RMS)

- Ability of mobile applications to work within the NFIRS, EMS, Property Management, and Inspection modules from mobile wireless devices in the field. (These applications should have the same or enhanced functionality as the desktop client to facilitate operations in the field.)
- Ability of mobile applications to function in both connected and disconnected modes with the ability to sync data once connected assuring no data is lost. (These applications should have the same or enhanced functionality as the desktop client to facilitate operations in the field.)
- Ability to have staffing integration and CAD data integration in real-time.

### Other Requirements:

Software vendor shall be responsible to provide:

- Notifications for when system is down, software updates, and repair scheduling.
- Process for adding new feature request/enhancements
- How long major outages will take to resolve
- Any cyber threats that have occurred
- System back-up and redundancy

## **4 MINIMUM QUALIFICATIONS**

The following minimum qualifications must be present for a vendor to be considered for award of a contract under this RFP:

1. All required licensures, registrations, and certifications to do business in the State of Connecticut.
2. Experience working with public entities to provide financial budgeting software.
3. Key personnel assigned to the contract must have more than five years' experience in this industry.
4. Describe implementation and support of budgeting, forecasting, and reporting.
5. Staff, managerial, and fiscal resources to complete all elements of the project in accordance with the required timeline.

## **5 PREPARING A RESPONSE**

By submitting a response, respondents represent that they have thoroughly examined and become familiar with the scope of services outlined in this RFP and can perform the work to achieve majority of, or all of, the objectives contained within this RFP.

Proposals submitted in response to the RFP will be publicly available once a contract is executed or negotiations for the award of such contract have ended pursuant to Connecticut General Statutes Section 1-210(b)(24). All documents that the proposer believes to be confidential trade secrets and/or commercial or financial information and except under the above statutes should be clearly marked as such to preserve the

Freedom of Information Act exemption for confidential trade secrets pursuant to Connecticut General Statutes (5)(A) and (5)(B).

CRCOG may provide reasonable accommodations, including the provision of informational material in an alternative format, for qualified prospective vendors with a disability. Prospective vendors requiring accommodation shall submit requests in writing, with supporting documentation justifying the accommodation, to CRCOG at the following address:

CRCOG  
Re: Accommodation for RFP #2022-09-12.RMS  
241 Main Street, 4<sup>th</sup> Floor  
Hartford, CT 06106

Requests for accommodation must be received by the Deadline for Questions as listed on [www.crcog.bonfirehub.com](http://www.crcog.bonfirehub.com). CRCOG reserves the right to grant or reject any request for accommodation.

Respondents are asked to submit all responses to the location outlined on the coversheet. Respondents must submit electronic versions of all documents in their entirety at [www.crcog.bonfirehub.com](http://www.crcog.bonfirehub.com)

Receipt of sealed proposals for furnishing the services described herein is due **no later than the proposal due date and time listed on [www.crcog.bonfirehub.com](http://www.crcog.bonfirehub.com)**. **The clock which will be used for the submission deadline will be as listed on the Bonfirehub portal.**

**A. Questionnaire.**

All vendors are required to fill out the questionnaire for this RFP. This questionnaire has 3 tabs that need to be completed. They are as follows:

- Company Information.
- Current Users and References. Submit five current clients (Note: Government references are strongly preferred). If you have additional references you would like to submit, please submit it as a separate document under Relevant Experience.
- Project Team. A list of three personnel who will be assigned to the contract. Please describe the roles and responsibilities of each team member.

**B. Project Understanding / Approach and Relevant Experience**

This is a document the vendor should submit (pdf format, please). Describe in detail your understanding of the scope of services required and your vendor's ability to provide the full spectrum of needs outlined in the Scope of Service as well as your vendor's relevant experience in fulfilling those needs. Describe in detail your approach to providing the desired services and highlight any relevant special services your vendor provides that could be beneficial, particularly those that may not be offered by other vendors. As part of your response, please specifically address:

- what makes your vendor uniquely qualified to provide the services described in this RFP.
- Include specific examples of how your vendor has successfully customized similar solutions to serve the unique needs of municipalities or similar public agencies.

Please note, alternate proposals will be accepted for this section.

**C. Fee Proposal.**

This is an Excel spreadsheet (.xls or .xlsx) vendors are required to submit. A template is not provided.

CRCOG reserves the right to negotiate fees and project scope with the successful respondent if it is deemed to be in the agency's best interest. All proposals submitted shall be considered valid for at least one hundred and twenty (120) days from the opening date.

Please note, alternate proposals will be accepted for this section.

**D. Insurance.**

All respondents are required to submit, with their responses, a copy of the cover sheet from their insurance policy(ies) (or an equivalent piece of documentation) which demonstrates the vendor's current coverages and limits for General Liability, Automobile Liability, Professional Liability and Worker's Compensation Insurance as appropriate for the project work required herein.

**E. Additional Required Data.**

The vendor should also submit the following:

- A statement accepting of all terms, conditions and requirements contained in the RFP. If you do not accept all terms, conditions, and requirements, please submit a separate document that details an explanation.
- Statement stating you are legally licensed/registered to do business in Connecticut.
- Non-Collusion Certification: The company should certify that this RFP is being submitted without any collusion, communication, or agreement as to any matter related to the RFP with any other respondent or competitor.

## RFP: Fire/EMS Records Management Software (RMS)

- Documents, i.e., SOC 2 report, reflecting compliance with modern internet and cyber security practices.

Responses must be submitted no later than the time and date outlined on the coversheet. Responses should be submitted as outlined on the coversheet.

Any responses received after this date and time will not be considered.

### **6 QUESTIONS**

Questions shall be submitted only via CRCOG's bonfire portal at [crcog.bonfirehub.com](http://crcog.bonfirehub.com) **by the time and date listed at [www.crcog.bonfirehub.com](http://www.crcog.bonfirehub.com)**. No oral interpretations shall be provided. Responses shall be posted as addenda at [crcog.bonfirehub.com](http://crcog.bonfirehub.com). It is the respondent's responsibility to check the website for addenda prior to submission of any proposal.

Prospective vendors shall not attempt to communicate with, in writing, electronically or orally, any CRCOG official, employee or member town other than the method listed in this section, above. Prospective vendors shall not contact any other CRCOG officials or member towns in an attempt to gather information regarding this RFP, or in an attempt to influence CRCOG's consideration of its proposal. All inappropriate communications with CRCOG employees, officials or member towns will be forwarded to the proposal evaluation team. Inappropriate communications by a prospective contractor may, at the discretion of the evaluation team, constitute grounds for disqualification of that prospective vendor's proposal. Alternatively, the evaluation team may, at its discretion, consider such inappropriate communications when evaluating and scoring proposals.

### **7 RFP GENERAL TERMS AND CONDITIONS**

#### **A. Acceptance or Rejection by the Capitol Region Council of Governments**

The CRCOG reserves the right to accept and or reject any or all proposals submitted for consideration or to negotiate separately in any manner necessary to serve the best interests of the CRCOG and its members. Respondents whose proposals are not accepted shall be notified in writing.

#### **B. Ownership of Proposals**

All proposals submitted in response to this RFP are to be the sole property of CRCOG and shall be subject to the provisions of Section 1-210 of the Connecticut General Statutes (re: Freedom of Information).

#### **C. Changes to Proposals**

No additions or changes to the original proposal will be allowed after submittal.

**D. Contract Requirements**

A formal contractual arrangement will be entered into with the consultant, selected as per the CRCOG standard form of agreement. The contents of the proposal submitted by the successful respondent and the RFP will become part of any Contract award.

**E. Amending or Canceling Request**

CRCOG reserves the right to amend or cancel this RFP, prior to the due date and time, if it is deemed to be in its best interest to do so.

**F. Waiver of Informalities**

The Capitol Region Council of Governments reserves the right to accept or reject any and all responses to this Request for Proposals, or any part thereof, and to waive any informalities and/or technicalities that are deemed to be in its best interest.

**G. Collusion**

By responding, the vendor implicitly states: that his/her proposal has not been made in connection with any other competing vendor submitting a separate response to this RFP; is in all respects fair; and has been submitted without collusion or fraud. It is further implied that the vendor did not participate in the RFP development process, had no knowledge of the specific contents of the RFP before its issuance, and that no employee of CRCOG either directly or indirectly assisted in the vendor's proposal preparation.

**H. Assigning/ Transferring of Agreement**

Any successful vendor is prohibited from assigning, transferring, conveying, subletting, or otherwise disposing of the resulting agreement or its rights, title, or interest therein or its power to execute such an agreement to any other person, company or corporation without prior consent and approval in writing from CRCOG.

**I. Termination**

CRCOG may terminate any contract(s) or any part of any contracts resulting from this process at any time for: cause, default, or negligence on the part of the vendor; or if the vendor fails, in the opinion of the Agency, to meet the general terms and conditions of any resulting contract or to provide a level of service that is deemed to be in the best interest of the Agency.

**J. Severability**

If any terms or provisions of this Request for Proposal shall be found to be illegal or unenforceable, then such term or provision shall be deemed stricken and the remaining portions of this document shall remain in full force and effect.

**K. Affirmative Action**

The Towns participating in this RFP are equal opportunity employers and require a affirmative action policy from all vendors and vendors as a condition of doing business with the towns, as per Federal Order 11246. By signing the proposal sheet for this bid,

all vendors and contractor agree to this condition of doing business with the towns and should the towns choose to audit their compliance, the vendor agrees to cooperate fully.

**L. Insurance Requirements**

The Respondent shall, at its own expense and cost, obtain and keep in force during the entire transition and contract period the following insurance coverages covering the Respondent and all its agents, employees and sub-vendors and other providers of services, and shall name the Capitol Region Council of Governments and its employees and agents as an Additional Insured on a primary and non-contributory basis to the Respondent's Commercial General Liability and Automobile Liability policies. These requirements shall be clearly stated in the remarks section on the Respondent's Certificate of Insurance. In addition:

1. All policy forms shall be on the occurrence form.
2. Acceptable evidence of coverage will be on the ACORD form or a form with the same format.
3. All renewal certificates shall be furnished at least 10 days prior to policy expiration.
4. Each certificate shall contain a 30-day notice of cancellation.
5. Insurance shall be issued by an insurance company licensed to conduct business in the State of Connecticut which has at least an "A-" policy holders rating according to Best Publications latest edition Key Rating Guide.

Required insurance coverage:

1. **Professional Liability Insurance** with limits up to \$2,000,000 aggregate limit issued on claims made basis for the term of the contract and continuing for two years following the completion of the contract at the Vendor's cost.
2. **Comprehensive General Liability Insurance:** Vendor shall, at its own cost and expense, obtain and keep in force during the Term of the Agreement general liability insurance with minimum limits of 1 million per occurrence/ 2 million aggregate and shall name the CRCOG and their respective officers, officials, employees, agents, boards, and commissions as Additional Insureds on a primary and non-contributory basis. There shall be no special limitations on the scope of protection afforded to the CRCOG. Vendor shall assume any and all deductibles in the described insurance policies and Vendor's insurer shall have no right of recovery or subrogation against CRCOG. These requirements shall be clearly stated in the remarks section on Vendor's Certificate of Insurance. Insurance shall be written with insurance carriers approved in the State of Connecticut and with a minimum Best's Rating of A- and all deductibles, if any, are the sole responsibility of Vendor.
3. **Automobile Liability Insurance** including non-owned and hired vehicles in the same limits as indicated above.

4. **Workers' Compensation Insurance** at the Connecticut statutory limit including Employers' Liability with limits of \$100,000 each accident, \$500,000 for each disease/policy limit, and \$100,000 for disease for each employee.
5. **Excess Liability Umbrella Form** over sections B, C, and D-Employers' Liability with limits up to \$4,000,000.

**M. Hold Harmless and Indemnification**

In addition to its obligation to provide insurance as specified above, the Vendor, its agents and assignees shall indemnify and hold harmless the Capitol Region Council of Governments and its member municipalities, including but not limited to, its elected officials, and its officers, from any and all claims made against the CRCOG, including but not limited to, damages, awards, costs and reasonable attorney's fees, to the extent any such claim directly and proximately results from the negligent acts, errors, or omissions in performance of services by the Vendor during the Vendor's performance of this Agreement or any other Agreements of the Vendor entered into by reason thereof. CRCOG agrees to give the Vendor prompt notice of any such claim and absent a conflict of interest, an opportunity to control the defense thereof.

**8 RFP EVALUATION AND SELECTION PROCESS**

The following is a general description of the process by which a vendor will be selected for award of a contract to perform the services described in this RFP:

1. Request for Proposals (RFP) is released to prospective vendors.
2. All questions regarding this RFP, as well as the CRCOG's responses to the questions, will be posted as an addendum to the RFP.
3. All proposals must be received by CRCOG no later than the date and time specified on the cover sheet of this RFP. Late proposals will not be considered or reviewed.
4. Following the due date and time when proposals are due, the [envelope or package containing the proposals from each responding vendor will be opened by CRCOG personnel/the submitted proposals will be downloaded from Bonfire.] **The opening of the proposals is not open to prospective vendors or the public.**
5. CRCOG's evaluation team expects to take the following actions to determine the merits of the proposals that are submitted:
  - a. **Review of Proposals:** Review the proposals to determine whether they are responsive to the RFP and that they were submitted by responsible companies.
  - b. **Evaluation of Proposals:** Proposals shall be evaluated by using the following criteria:

Element	Weighting
Overall strength of proposal and experience	20
Project Understanding / Approach	40



RFP: Fire/EMS Records Management Software (RMS)

Quality of References	10
Fee Proposal	30
Minimum Requirements Met	Pass/Fail
Non-Collusion Statement Answered as True	Pass/Fail

- c. **Selection:** Selection shall be made of one or more respondents deemed to be fully qualified and best suited among those submitting proposals on the basis of the evaluation factors included in the Request for Proposals.
- d. **Oral Presentation:** At the option of the evaluation team, the evaluators may request oral presentations by any number of the finalists for the purpose of clarification and amplification of the materials presented in any part of the proposal. The evaluators may also request best and final offers (BAFOs) from one or more prospective vendors. However, prospective vendors are cautioned that the evaluators are not required to invite oral presentations, request clarification, or conduct negotiations and may award a contract based on the original proposal. Therefore, all initial proposals should be complete and reflect the vendor’s most favorable terms.
- e. **Negotiation:** At the discretion of the evaluation team, negotiations shall be conducted with the respondent(s) so selected. After negotiations have been conducted with the respondent so selected, the CRCOG shall select the respondent which, in its opinion, has made the best proposal, and shall award the contract to that respondent if it so chooses.
- f. **Award or Non-Award:** Should CRCOG determine in its sole discretion that only one respondent is fully qualified, or that one respondent is clearly more highly qualified than the others under consideration, a contract may be negotiated and awarded to that respondent. The award document will be a contract incorporating by reference all the requirements, terms and conditions of the solicitation and the vendor’s proposal as negotiated. CRCOG reserves the unqualified right to reject any and all proposals when such rejection is deemed to be in its best interest.