

City of Foster City

3/23/2022

REQUEST FOR PRICING

Agenda Management System Replacement Project

City of Foster City RFP – Agenda Management System Replacement Project

The City of Foster City requests pricing for an Agenda Management System Replacement. Pricing is to include professional services for software deployment and migration of existing data and files. The vendor selected will be responsible for the implementation and maintenance of all selected components, project management, training, and providing a complete installation that meets the City's performance requirements.

The City of Foster City is interested in receiving proposals from qualified vendors to provide a turnkey solution to automate the City's agenda preparation and publishing, meeting management process, video streaming, and hybrid in-person/Zoom functionality.

The City invites you to submit a proposal to furnish materials in accordance with the terms, conditions and specifications contained in this document. Please complete the proposal form as instructed below and return it to the specified e-mail address by the due date. No extensions to the deadline will be allowed. All responses must be in an email to:

TO: Rob Lasky
rlasky@fostercity.org
Due Date: 4/21/2022

The undersigned proposes to provide solution and installation services to the City for the stated prices in accordance with the terms and conditions set forth in this document.

VENDOR:

_____ Company Name	_____ Street Address of Company
_____ Signature of Officer	_____ City, State, Zip
_____ Printed Name of Officer	_____ Telephone No./Fax Nbr.
_____ Title of Officer	_____ Federal I.D. Tax Number

City of Foster City RFP – Agenda Management System Replacement Project

This Request for Proposal includes the following Sections:

Section 1	Introduction / Background
Section 2	System Requirements
Section 3	RFP Submittal Requirements
Section 4	Project Services
Section 5	Vendor Evaluation Process

TERMS AND CONDITIONS

1. **DATE DUE:** 4/21/2022
2. **QUESTIONS:** Call Rob Lasky at 650-740-7101 or e-mail questions to rlasky@fostercity.org. All communication/questions are to be submitted by any vendor to Rob Lasky via e-mail. All responses to questions/clarifications will be posted on the City’s website as addendums and any vendor who has provided an e-mail will be notified via -email of the posting. Vendors are required to provide an e-mail address to which we may send responses.
3. **REPLY FORMAT:** The Vendor’s proposal, signed acknowledgment terms and conditions, including all attachments, must be returned by the due date with submittal. Vendors are required to clearly identify any limitations or exceptions to the requirements defined in this RFP. Alternative approaches will be given consideration if the approach clearly offers increased benefit to the City. **The City is not responsible for non-receipt or misdelivery and that it is bidder’s responsibility to ensure we have received their communication. The City’s e-mail system does not allow attachments larger than 25MB.**
4. **DEADLINES TIME ZONE:** Where referred to in document, all times are in the Pacific Time Zone.
5. **VENDOR QUALIFICATIONS:** The vendor has been in business doing this type of work for at least the last three years.
6. **RESPONSIVENESS AND SELECTION PROCESS:** The decision for selection will be made on a combination of criteria, including: total cost (including ongoing operating costs); responsiveness to RFP, reputation of Vendor and products in similar installations; quality and completeness of proposal; Vendor’s ability to perform in a timely fashion; and the City’s perception of Vendor’s stability within the industry.

The City reserves the right to reject any and all proposals or to waive any minor errors, discrepancies or irregularities. The selection will be at the discretion of the City and may be made in any manner that best meets the needs of the City.

7. **FIRM PRICES:** All quotes shall be held firm for a minimum of ninety (90) days after the proposal due date to allow adequate time for the City to consider each proposal and make an award. All blanks for unit price and total price shall be completed. All prices shall include sales tax where applicable. Any charges for boxing, packing, crating, cartage, handling, insurance, unloading, inside delivery, and any other related charges shall be included in the bid price provided on the Bid Form. Any discrepancy between the unit price and the extended or total price shall be determined by taking the lower price. Upon receipt of this proposal by the City, the Vendor shall be presumed to be thoroughly familiar with all aspects of this work. The failure or omission to examine any location, equipment, form, instrument or document shall in no way relieve Vendor from any obligation with respect to this proposal.

City of Foster City RFP – Agenda Management System Replacement Project

8. **WARRANTY:** The delivered and installed goods, equipment or services shall be warranted to be free from defects in materials and workmanship. The warranty period shall begin upon final acceptance by the City. As a minimum, all goods, equipment and services shall be warranted to operate satisfactorily in accordance with the requirements of these specifications, the representations of the Vendor and the published specifications of the manufacturer(s) for a period of at least one (1) year from the date of acceptance by the City.
9. **CANCELLATION CLAUSE:** The City may terminate and cancel any purchase order or contract that result from this RFP without obligation at any time prior to receipt of the goods or services.

Section 1

Introduction / Background

1.1. The Project

The City of Foster City is requesting pricing for an Agenda Management System Replacement. Pricing is to include professional services for software deployment and migration of existing data and files. The vendor selected will be responsible for the implementation of all selected components, project management, training, and providing a complete installation that will meet the performance requirements as stated in final contract.

The City of Foster City is interested in receiving proposals from qualified vendors to provide a turnkey solution to automate the City’s agenda preparation and publishing, meeting management process, video streaming, and hybrid in-person/Zoom functionality.

The vendor shall submit a proposed time-line schedule for implementation. The vendor will need to identify staff from their company who will be working on their team and confirm their availability for the duration of the project.

Tentative schedule and dates:

Release RFP	3/23/2022
Vendor Written Inquiries (on or before)	4/11/2022
City response to Written Inquiry (on or before)	4/12/2022
Proposals due from potential bidders	4/21/2022
Scripted Demos	5/9/2022-5/13/2022
Vendor Notified of accepted bids	5/23/2022
Award of Contract	6/6/2022
System Implementation	TBD

1.2. Current Systems Environment

1.2.1. The City of Foster City currently uses CivicClerk for Agenda Management.

1.2.2. We have 20 meeting types currently configured in CivicClerk, The agenda types we have configured are:

- City Council Regular
- City Council & EMID Special Meeting
- City Council Closed Session
- City Council Special Meeting
- Planning Commission Regular
- Planning Commission Special
- Planning Commission Study Session
- Planning Comm-Park and Rec Comm Joint Study Sessio
- CC FCJPA Regular Meeting
- City Council Shirt Sleeve Session
- Parks and Recreation Committee
- Audit Committee
- Levee Bond Oversight Committee
- Traffic Review Committee
- Youth Advisory Committee
- Land Use Subcommittee
- Infrastructure/Facilities Subcommittee
- Communications & Public Engagement Subcommittee
- Transportation Subcommittee
- Economic Development/Sustainability Subcommittee

City of Foster City RFP – Agenda Management System Replacement Project

- 1.2.3. We have agendas and on-demand video available for meetings as far back as 2010 in CivicClerk. The total number of agendas available in CivicClerk is roughly 900. Total number of agendas with on-demand video stored in CivicClerk is roughly 400.
- 1.2.4. We currently have roughly 100 users set up as staff report authors/sponsors.
- 1.2.5. We have one approval process that contains 4 reviewers.
- 1.2.6. The City has been using Zoom Webinar for our Council Meetings during the pandemic, and we plan to continue to use Zoom Webinar in a hybrid setting (in-person at the Council Chambers and virtual via Zoom) for the foreseeable future.
- 1.2.7. The City runs a Nutanix/VMWare server cluster on-prem, so we are open to on-prem deployed solutions. But we also understand there can be benefits of cloud-based solutions. So, we will welcome proposals for either on-prem or cloud-based solutions.


Section 2

System Requirements

The following are the minimum requirements we expect from the vendor's solution. Some requirements are specific to the City. We expect your response to address every requirement.

STAFF USE

1. System must have a role-based security system, allowing some users more access to functions than others (for instance, some user should be able to create new agendas, while others should only be able to add agenda items).
2. Single sign-on is desired (but not required). AzureAD/SAML integration is preferred.
3. System must allow for collation of staff reports and supporting documents, conversion to a cross-platform format (i.e. pdf), and publishing of the agenda documents for the public to view. Original document formats include but are not limited to: MS Word, MS Excel, PDF's, GIS maps, etc.
4. System must allow staff to roll-up and publish agenda packet easily, which immediately allows access to the public to that agenda packet. System must also allow for re-publishing if changes are required after publishing.
5. Publishing the agenda should generate a single-pdf combined agenda packet file, as well as generate an online version with linked documents for each agenda item.
6. The system should allow adding page numbers to the agenda packet, and those page numbers should be shown consistently in both the combined single pdf and the linked-document version of the packet.
7. Ability to strip or flatten comments from attachments before publishing agenda. This has come up when members of the public downloaded our compiled agenda packet pdf and it still contained internal comments from the source pdfs submitted by a consultant.
8. System must allow staff to upload or link an on-demand video after the meeting has ended. Staff must also be able to add timecode indexing so the video playback will jump to the correct location corresponding to the agenda item the user clicked on.
9. System must have a customizable agenda layout, with ability to build and choose from multiple agenda templates.
10. System must include an agenda item review process workflow, with the ability to create custom workflows.
11. The review process must provide internal collaboration options such as annotating and commenting on agenda items as they are created and sent through the workflow. Ideally, reviewer comments would function similarly to the "track changes" function in MS Word. Describe the collaboration options available in your product.
12. System must allow staff to add a cutoff date/time in order to lock an agenda to prohibit users from editing agenda items. Admins must also be able to override the cutoff date/time.
13. Users must be able to rearrange items within an agenda and between agendas. Users must also be able to copy an item from a previous agenda to a new agenda (such as for items that are taken to Council annually).

14. Users must be able to add agenda items to the system that do not have a meeting date assigned yet. Once a meeting date is assigned, these items should be able to be moved to that agenda with any other history/comments intact.
15. System must provide the ability to run custom-built ad-hoc reports.
16. One specific report the City utilizes heavily for forward planning is a Long Range Draft Agenda (LRDA). A sample LRDA is available here:  [Long Range Draft Agenda - Sample.pdf](#). Currently, we produce this report through a multi-step process: exporting the data from CivicClerk and using MS Access to generate the formatted report. We would like to make this process simpler, ideally being able to generate the report directly from the chosen Agenda Management solution. Please describe if your solution would be able to generate such a report and whether 3rd party tools would be needed. Include a sample with your proposal (if possible).
17. Zoom Webinar integration is desired (but not required). The City has been using (and intends to continue using) Zoom webinar for virtual and hybrid meetings since 2020. Currently, this is a manual process, with IT staff creating the webinar in Zoom, sending panelist invites (names and emails provided by City Clerk), and sharing the public link with City Clerk so they can include on the agenda. Integration with Zoom could include creating the webinar from the Agenda Management system, inviting panelists from Agenda Management, adding the public attendee link to the agenda automatically, starting the Zoom webinar directly from Agenda Management, and allowing public attendees to speak directly from Agenda Management. Describe if/how your product integrates with Zoom Webinar.
18. A Council portal is desired (but not required) that allows Council to leave questions for staff on specific items, and for staff to be able to respond to those questions. Currently, we have Councilmembers download the full packet pdf and add use the comments feature of Adobe Acrobat, and then share the pdf with staff to respond to questions. Also, Councilmembers should be able to make private/personal annotations (not shared with staff) to an agenda packet so they can refer to those comments during the live meeting.

PUBLIC ACCESS

19. The ability for the public to access published agendas and video is critical. Being able to include the public agenda portal as an iframe or similar on the City's website would be ideal.
20. Public Comments are currently accepted via email and City Clerk staff attaches these emails as a pdf to the agenda packet an hour before the meeting begins. A simpler process would be ideal, such as allowing the public to submit comments directly through the Agenda Management solution (with staff review). Describe how your system accommodates public comments.
21. Full-text searching is a requirement for both the staff and public interfaces. Date range and agenda type filters are also required. Describe any other search features that are supported in your solution.
22. User interfaces should be mobile-friendly for both staff and public.

OTHER

23. Selected vendor will be expected to perform migration of existing agenda documents and videos to new system.
24. Other features that we are not currently using, but would like included as OPTIONAL pricing line items include:
 - a. Integration with Adobe Sign and/or DocuSign, or native e-signature capabilities.
 - b. Minutes generation during the meeting.

City of Foster City RFP – Agenda Management System Replacement Project

- c. Electronic voting for elected officials.
- d. In-Room and online real-time agenda item display that changes as we move through the meeting.
- e. In-Room and online timer function for public comments. 3 minutes are currently allowed for public comments, and we have an in-room DSAN timer.
- f. Live streaming that can be stopped/started from within the Agenda Management system.
- g. MP4 recording that can be stopped/started from within the Agenda Management system.
- h. Ability to add computer generated subtitles to meeting video. For real-time streaming and/or on-demand videos.
- i. Integration with Document Management System. We currently have an open RFP for Document Management, so we do not know what system it will be yet.
- j. API for potential future integration with other systems.

Section 3

Proposal Submittal Requirements -- below are all the items that must be submitted by the Vendor. Any Vendor who fails to include responses to the following requirements shall be deemed non-responsive.

Requirement A – General

1. Proposed Timeline for Implementation
2. Copy of proposed Maintenance Contract which includes support options
3. Response to all City requirements (See Section 2).

Requirement B - Pricing Sheet

1. Upfront Software Licensing/Subscription Cost (with each component itemized)
2. Ongoing Annual Maintenance/Subscription Cost (with each component itemized)
3. All Project Service Costs (See Section 4)
4. Additional Modules/Components Price(s) (Optional)

Section 4

Project Services

1. Installation and Integration
Vendor shall be responsible to install and integrate all software/components to complete the system to 'final acceptance' by the City. The City shall determine the final decision on the installation work to be done by whom and when.
2. Data Migration
Vendor shall provide costs for migrating existing agenda files and videos from the City's current Agenda Management System (CivicClerk). We currently have 20 different meeting types, 900 meeting agendas, and 400 meeting videos stored in CivicClerk.
3. Training
 - 1.3.1. Vendor shall do knowledge transfer to City Project Team during the course of the implementation.
 - 1.3.2. Vendor shall provide pricing for an administrator training session for all designated system admins. Vendor shall propose suggested length of administrator training sessions for each purchased module,
 - 1.3.3. Vendor shall provide pricing for in-person and/or virtual training for end users of the proposed system. Please include training options for both document creators/indexers as well as read-only (search only) users. Please include the length (in hours) of the training sessions, the suggested maximum number of participants for each class, and whether users will be expected to have a PC available to be hands-on during training.
4. Maintenance and Support
Vendor shall submit a three year maintenance pricing structure so the City can prepare the necessary budget. Vendor shall detail what the maintenance/support contract covers – vendor responsibility and city responsibility.

Section 5

Vendor Evaluation Process

1. Selection/Evaluation Criteria for RFP Proposals

Proposals will be reviewed by members of Foster City’s IT Division and the City Clerk Department.

A subset of vendors will be requested to perform 1 to 2 hour scripted demos during the week of 5/9/2022-5/13/2022. Selected vendors will be contacted during the week of 5/2/2022 to set up a timeslot for their demo.

2. City Purchasing Ordinance ‘3.04.260 --Lowest responsible bidder determination’ states as follows:

In determining the "lowest responsible bidder," the following factors may be considered in addition to price:

- A. The ability, capacity and skill of the bidder to perform the contract or provide the service required;*
- B. The character, integrity, reputation, judgment, experience and efficiency for the city or other contracting parties;*
- C. The quality of performance of previous contracts or services for the city or other contracting parties;*
- D. The previous and existing compliance by the bidder with the laws and ordinances relating to a contract or service;*
- E. The sufficiency of the financial resources and ability of the bidder to perform the contract or provide the services;*
- F. The ability of the bidder to provide future maintenance and service for the use of the subject of the contract. (Ord. 536 § 1 (part), 2007)*

3. Project Specific Evaluation

RFP Format Response Section

The vendor shall respond to all the areas listed in Section 3. The vendor shall describe how their proposal will meet the objectives, tasks, requirements, and other services identified in this document.