Request for Proposal

For

The Design, Implementation and Maintenance of a Computerized Agenda Preparation and Document Management System

for the

City Council of New Orleans, LA

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Contact Information Concerning RFP:

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RFP

The Design, Implementation and Maintenance of a Computerized Agenda Preparation and Document Management System

General Information

The City Council of New Orleans seeks a consultant to design, implement and maintain a comprehensive, scalable, and flexible agenda preparation and document management system.

Goals of this System

The City Council of New Orleans is desirous of developing processes around public meetings which are green, provide greater transparency to citizens, streamline government and are cost effective. To that end, the Council has implemented the Granicus streaming media and meetings management system which allows citizens access to meetings video and meetings actions. To further this process, the New Orleans City Council is seeking an agenda preparation and document management system.

This system would automate and manage the preparation and submission of documents to be acted upon in meetings. It would streamline the preparation of the agenda, manage the ongoing process of moving items to appropriate later dates, as well as create and make available on the web electronic agenda packages of all meetings-related ordinances, resolutions, motions, reports, etc.

This system should also manage the documents for signature and eventual web access after passage at a meeting. The system should serve all city departments, boards and commissions and the New Orleans City Council as required for these purposes. The system must integrate into the City of New Orleans and the City Council of New Orleans' web sites, and two existing meetings and document systems, the Granicus streaming media and meetings management system and the Municode codification system and bear all costs related to said integration. To accomplish this, the system must be able to work on the City's network and computers or the proposal must include the necessary upgrades in either as required. The respondent must be able to implement and support the system including planning, training and documentation.

Interface Requirements for the RFP

Your proposal should address each of the topics set forth in this RFP. You should also utilize any response tables as they are presented here.

Your proposal should work within the City of New Orleans current computing environment. Our current computing environment consists of:

- Wide-Area Network consisting of over 100+ in City Hall where the proposed system will be primarily used;
- Our network supports services across the city WAN for all local government agencies primarily running on a Cisco-based backbone with Microsoft Servers and some applications residing on an IBM mainframe;

- 1600 client (desktop) workstations primarily operating on Windows XP with 5500+ active users; and

- Software applications include: List to be provided following response as applicable.

- Any server capacity required must be acquired in this process.

The City of New Orleans uses a number of software applications critical to its core operation and mission. We expect that the proposed Computerized Agenda Preparation and Document Management System will need to interface or integrate with the following systems in order for the City of New Orleans to maximize its investment in its current applications and the purchased EDMS:

- Microsoft SharePoint; and

- Microsoft Office

- Active Directory.

Scope of Work

Neither this section nor any part of this RFP is intended to be all-inclusive. Therefore, vendors should include in their responses any items they deem relevant and important to the project or The City of New Orleans.

The proposed solution shall be of an expandable, modular design to readily incorporate additional enhancements in the future. It should be developed, tested, and maintained using a high-quality software development methodology for long-term reliability and technical efficiency.

The City Council of New Orleans seeks to acquire an agenda preparation and workflow management system which will:

- Support document creation, including the support of standard templates which are currently in use in the City or may come into use in the City.

- Provide legislative file numbering.

- Serve the New Orleans City Council and its committees, as well as Boards and Commissions and other meeting bodies with document creation and management.

- Support secure, and rights restricted document creation and versioning as well as routing to reviewers for modification and or approval, using electronic notifications to keep things moving.

- Support all document forms for submittal.

- Track an agenda item from its creation, draft updates, approvals, introduction in a public meeting, referrals and recommendations, signatures, readying for codification and publishing on the internet as desired.

- Interface to the agenda process for Granicus, adding the documents created and routed through the proposed system, making said documents available in the online published agendas in PDF form, posted on websites maintained by the New Orleans City Council, and the City of New Orleans, if desired.

- Provide an audit feature which allows tracking and protection of documents.

- Provide full back ups of data to ensure reliability.

- Be easy to use, require minimum training, easy to reconfigure document routing.

- Manage the post meeting document flow for signatures, routing final documents to departments, archiving and interface to Municipal Code Corporation for the code of ordinances.

- Ability to search document by file number, status, creation date, controlling board, agenda date, final action date, item sponsor, index attachment, action date action by action and sent to, both within City Hall and through a public portal.

Documentation

The City Council of New Orleans expects the chosen vendor will provide for each software component a complete set of software documentation for users and administrators. The documentation can be printed, on CD-ROM, or downloadable from the vendor's Website. The City Council and the City of New Orleans will be given permission to reproduce the documentation or parts of the documentation as needed. It is expected that the vendor shall maintain its copyrights to all materials.

License Structure

The license structure of the proposed solution should accommodate the departments and users as outlined above. The City Council of New Orleans

expects the licensing structure to be enterprise-based so that it will also accommodate growth. The Council also expects the licensing structure will include price breaks at reasonable intervals for number of licenses acquired.

Maintenance

All vendors should include Managed Services that include complete monitoring and maintenance of all on-site hardware and 24/7 technical and user support for your complete solution. The managed services should also include all software upgrades and bug fixes. All software upgrades should be included as part of your Managed Services program. This includes both the rights to use the upgraded software and any services required as part of the upgrade process.

Support

The City Council of New Orleans anticipates the chosen vendor will have the technical expertise, staffing, and protocols to effectively support the implementation of its proposed system in The City of New Orleans. Live support should be offered 24 hours a day, 365 days per year. Other desirable support options include FAQs, known issues tracking, email and online-live support, and access to support managers and development staff if required.

Successful vendors need to continually monitor, on a 24/7 basis, all the software and hardware included in the system. Should any malfunction appear, the vendor will immediately notify The City of New Orleans and proceed to resolve the issue.

Warranty

The City of New Orleans expects all software and hardware to be covered by a warranty period of no less than 1 year. All software and hardware warranties should provide for the operability of the system.

Implementation

This section provides a brief description of the expectations, design and training considerations The City Council of New Orleans anticipates during project implementation. As before, this section is not intended to be exhaustive and The Council is relying on vendors who submit proposals to incorporate the highest levels of service and expertise during the implementation phase(s) of this project.

It is intended that this system in its workflow design will serve the meeting processes of the City Council of New Orleans and the departments and Boards and Commissions which regularly submit legislation to the Council and Council committees. It is further intended that the system will support City Boards and Commissions who conduct public meetings. The list below is not intended to be comprehensive, but it does represent the most likely departments, and Boards and Commissions to submit legislation or use the system for their own meetings.

City Departments
Mayor's Office
CAO - Budget
CAO - Capital Projects
CAO - OMI
Law Department

New Orleans Fire Department
New Orleans Police Department
Civil Service
Homeland Security
Parks and Parkways
Safety and Permits
Mayor's Office of Technology
Property Management
Human Services

Council Offices
Council Chief of Staff Office
Council Fiscal Office
Clerk of Council
Council Research
Council Utilities Department
Seven Councilmenber Offices

Boards and Commissions
Mosquito Control Board
City Planning Commission
Vieux Carre Commission
Historic District Landmarks Commission
Alcohol and Beverage Control Board
New Orleans Public Library
Board of Zoning Adjustment
Alcohol and Beverage Control Board
Sewerage and Water Board
Neighborhood Conservation District Committee
Airport
Regional Transit Authority

It is intended that the respondent assist the city in creating a workflow process and also to implant the workflow for managing submissions from the above. It is also intended that the meetings held by the New Orleans City Council and its committees as well as the City Departments and Boards and Commissions be

supported in document creation, agenda preparation, and post-meeting dispensation, enjoying all of the features of the system.

Timeline

The City Council of New Orleans hopes to complete phase one of the implementation by June 15, 2011 and to complete the final phase of the implementation no later than December 15, 2011. This would include all implementation steps, integration development, system testing, training, and any other steps identified by the chosen vendor.

Training

Training is considered an essential element of this project. On-site training will be required by the approved vendor for all users in New Orleans that will utilize the technologies. This will be done in a sufficient manner so that all members of the City Council and appropriate staff will understand the vital functionalities of this system, as will all relevant City of New Orleans staffers, and staffers at boards and commissions who regularly participate in the New Orleans City Council meetings. Those departments and boards and commissions are outlined above.

Qualifications/Experience

Your firm may propose the entire solution. If the proposal by your firm requires the use of sub-contractors, partners, and/or third-party products or services, you must clearly state this in your proposal. The City Council of New

Orleans requires that the firms submitting proposals shall have primary project and service liability for all products and services which shall collectively meet the RFP requirements.

Your firm shall remain solely responsible for the performance of all work, including work that you sub-contract.

Contents of Proposal

Transmittal Letter. Please provide a formal letter of transmittal with your proposal that commits your firm to its proposal and states that the proposed solution meets the requirements of each subsection of this RFP. The transmittal letter must be signed by an officer of your firm authorized to do so. Also include contact information for: (1) the person responsible for answering questions regarding the proposal, (2) the person responsible for contract negotiation, and (3) the signer.

Proposal Overview. Please give an overview of the proposed solution including your company's unique abilities to meet the project requirements, software requirements, and hardware requirements. Include exceptions to the RFP if any. In the product description below, please include the answers to these questions.

1. What are the primary benefits of your solution?

2. What are the primary restrictions of your technology?

3. How will the implementation of your solution impact the City of New Orleans' and the City Council of New Orleans' staff. Include in this response items such as the impact on workloads, increases/decreases in staffing, and changes to job descriptions.

4. Describe some of the user friendly features of your system that make it easy to learn and work with.

5. Does the proposed solution provide standard Microsoft Windows functionality such as copy, cut and paste functionality, spell check, etc.? Describe the techniques used for data entry in your solution. Are there any efficiencies built into the data entry system and if so what are they? How do you validate that agenda items have been entered properly?

6. Describe your search functionality.

7. Describe how you deal with templates. How do you customize these items?

8. Describe the kinds of system reports available. How do you customize these items?

9. Can your system generate PDF's? If so, please describe how.

10. How are approval levels implemented in your system; how is it automated? Can a group of items be approved and if so how? Can a user configure the process, and if so how? How are approval overrides handled and tracked in your system?

11. What is the process for configuring workflows in your system? Are there default workflows? What mechanisms does your system use to allow modifications to items that are currently in the approval cycle? How are these items re-routed for final review. What level of revision-tracking functionality does your system provide? What level of versioning functionality does your system provide? How do you view change history of an agenda item and indicate the type of information available on change history.

12. How does your system support quality control processes in the creation and approval of agenda items and agenda documents.

13. Describe the training available in the delivery of end user training as well as the documentation resources that are available with your system. Please explain your training and support approach.

14. Please describe what you would propose for a training plan for this implementation.

15. Describe your software and ongoing training support. How do you handle product upgrades? How are customer requested enhancements handled?

16. Explain your procedures for resolving customer problems.

17. Can you provide the web server, database server, file application server, required software, client PC, architecture, system performance and availability, network requirements, system administration requirements and any other relevant technical information which should exist in the City of New Orleans IT operations and which are proposed as a base for this system?

18. Please provide any other relevant technical information which you see as a benefit to the City in implementing your system, including your systems performance standards, testing and acceptance, differentiation from other know systems available in the marketplace.

19. How will your system handle business continuity, disaster recovery, data backup and restore, archive, retention and disposal practices?

20. Please propose an implementation schedule which you think is reasonable to achieve, including the process of systems integration you propose.

21. Please detail the costs of your system over the next three years, feel free to indicate optional features, describing their functionality and benefits, and pricing them accordingly.

Company Information. This section provides each vendor with the opportunity of demonstrating how its history, organization, and partnerships differentiate it. Please include the following: Company address, phone number, and email address.

- Describe the history of your company.

- What is your total number of installations of the proposed application software product?

- What is your service commitment to customers and measurements used?

- Are audited or otherwise verifiable financial statements available upon request?

- How many employees are involved in providing direct technical support for the proposed application software product?

- Is your organization involved in any pending litigation that may affect its ability to provide its proposed solution or ongoing maintenance or support of its products and services?

If you are a value added or similar reseller of the system you are proposing, answer the above questions for the software's parent company.

Sub-Contractors/Partners. List any sub-contractors, partners, and/or third party application providers who are involved in fulfillment of proposed solution. Describe the specific role of each.

References. Give contact information three of your customers including the organization's name and the contact's name, title, address, telephone number, and email address. Also include the products the customers use.

Vendor's Proposed Solution

Please give a detailed description of the solution you are proposing. Include software modules and hardware required to operate the system. Tell why your solution best meets the needs of The City Council of New Orleans.

Product Descriptions. For each product module you are including in your proposal, provide a detailed description of its purpose, benefits, and key features. Illustrate the dependencies between modules (e.g. if the organization selects modules "C" and "D" it must have module "B"). Additionally, please indicate wherever a module is required or optional.

Documentation. Both system level and user documentation must be provided. List and describe the available documentation that is included in the proposal pricing in this RFP and the media on which it is published.

Maintenance. Describe the details and duration of any manufacturer's warranty on proposed software system including how often you provide product updates.

Support. Vendor shall describe the extent and nature of software support services, including Web-based and telephone support, and consulting support.

License Structure. Please describe your software licensing structure in detail. Do so for each product or module if they differ from one another.

Warranty. Describe what is included with the manufacturer's warranty.

Project Implementation

This section covers various aspects of your firm's approach to implementing projects. Please respond with as much relevant detail to The City Council of New Orleans project as possible given the information you've been provided in this RFP and/or at the pre-proposal conference (if applicable).

This must include verification from Granicus (in the form of an integration verification letter from Granicus) which states that the solution proposed by the company includes all necessary costs and will integrate with the City's Granicus solution.

Project Team

List your project team. Provide names, roles, involvement levels and durations, and relevant experience for each person on the team.

Describe the level of The City of New Orleans staff involvement required during implementation.

Methodology and Approach

Provide outline and approach for the project including:

- Defining your criteria to determine when installation is complete.

- Providing a proposed schedule for implementation steps.

- Describing what type of training and the number of people to be trained that is included as part of the initial installation.

- Describing how you will schedule and provide for training of end users, technical staff, and system administrators including initial training, consultation, and follow-up training.

- Describing what types of additional training may be available either through your company or through another agency.

<u>Recommended Hardware Configuration</u>

Describe in detail all hardware required to implement the proposed software system and provide a diagram of the recommended hardware configuration.

Describe the level of The City of New Orleans staff expertise required to support the suggested hardware.

If your firm is acting as a hardware reseller, describe the details and duration of any manufacturer's warranties on proposed hardware.

<u>Requirements</u>

Identify any potential performance impact to the existing LAN/WAN and provide recommendations to minimize any performance impact. Identify any other system issues. List minimum client workstation requirements.

<u>Pricing</u>

Provide complete cost breakdowns for system design, software, hardware, maintenance, training and system implementation, and any additional services required. List and describe in detail the projected maintenance costs involved in this proposed system. List and describe the costs to train additional 'basic' or 'advanced' users in the future including descriptions and costs for documentation materials, consulting, installation, travel and per diem. List and describe pricing for optional items associated with the system.

Evaluation Criteria

Vendors will be evaluated against the following criteria:

- Ability to meet the functional, technical, and interface requirements with minimal custom development

- Deliverables and documentation as stated throughout the RFP including the capability to provide ongoing support

- Financial stability and company experience with the applicable business and technical functions

- References

- Total cost of build out, licenses and maintenance fees

- License and maintenance agreement terms and conditions

- Involvement at the professional level within the firm of minorities, women, New Orleans domiciles and/or involvement of certified disadvantaged business enterprises

Proposal Process

A preproposal conference will be conducted by the Council staff committee at 1:00 P.M. on September 27, 2010 in City Hall, City Council Chambers. All questions of potential proposers will be addressed at that time. **No other written or oral communications from potential applicants regarding this proposal shall be made to any Councilmember or Council staff person during this Request for Proposal process.**

Fifteen (15) copies of the final proposal must be submitted by 3 pm on November 1, 2010 to the Clerk of Council, Room 1E09 City Hall, 1300 Perdido St.**,** New Orleans, LA 70112.

An evaluation committee composed of (REVIEWER'S) will review and evaluate the proposals, selecting finalists. Vendor finalists may be invited to give a scripted demonstration of the capabilities of the proposed solution to the evaluation team. Your demonstration (if requested), along with questions and answers, will be a critical component of the overall vendor evaluation.

For each proposal selected for referral, the staff committee will contact one or more of the persons suggested as references.

The report of the evaluation committee will be provided to the (CABLE/TELECOM COMMITTEE), comprised of three (3) Councilmembers and an alternate member. The Committee may interview one or more of the respondents selected by the evaluation committee, or may make a recommendation to the City Council. The contractor must be selected by Motion of the Council. It is anticipated that the selection process will be completed within two months.

Additional information

The City Council of New Orleans is not liable for any costs incurred prior to entering into a formal written contract. Any costs incurred in the preparation of the proposal, interview or other precontract activity are the responsibility of the proposer.

All proposals submitted become the property of the City and as such are public information.

The City Council of New Orleans reserves the right to reject any or all bids or proposals which are deemed to be non-responsive, late in submission, or unsatisfactory in any way. The City of New Orleans shall have no obligation to award a contract as a result of this RFP.

Attachment (evaluation grid)

A. Agenda Preparation Features	Y/N
Secure log-in available allowing login for department & inter-department access by those given these rights	
Ability to grant log-in overrides for substitute approvers	
Support for multiple meetings	
Support for multiple meeting types	
Number of end users and/or site licenses (please provide number)	
Agenda preparation follows a client-defined workflow	
Agenda preparation allows for future redesigns of workflow	
Document tracking/history beginning to end in real time	
Automatically renumber agenda items when editing	
Easily track the whereabouts of every agenda item in the routing process	
Move and copy agenda items from one meeting to another	
Interdepartmental staff assignment	
Multiple interdepartmental staff assignment	
A centralized administrator	
Edit rights as determined by organization	
In-route editing of documents by departments	
Supports multiple file formats: including Word, PDF, Excel, GIS, AutoCad	
E-mail notifications to staff beginning to end of process	
Inter-department approvers deadline alarm	
Returned for edit/correction, final approval	

B. Agenda Creation Features	
Secure log-in available allowing login for department & inter-department access by those given these rights	
Ability to grant log-in overrides for substitute approvers	

Amount of meetings/types (indicate number supported)	
Agenda creation follows a client-defined workflow	
Agenda creation allows for future redesigns of workflow	
Document tracking/history beginning to end – real time	
Interdepartmental staff assignment	
Automatically push finalized agendas to the City's and Council's website	
Agenda can be edited at any point in the workflow	
A centralized administrator with edit rights granted to other boards, commissions, meetings	
Agenda can be produced utilizing and supporting insertion of documents in multiple file formats including Word, PDF, Excel, GIS, AutoCAD, et al	
Publication: advanced access for Councilmembers with secure log-in, also members of other meeting bodies for their meetings	
Opportunity for delayed public notification	
Automatic integration with the City and Council websites	
E-mail notifications: beginning to end	
Interdepartmental approver process with deadline alarm	
Return for edit/correction, final approval possible	

C. Meeting Activity Tracker Features	
Client-defined template	
Template can be changed as needed	
Standard wording and phrasing by Clerk and other meeting bodies	
One-click creation	
Integration with Granicus as text document	
Published as PDF file type	
Indicate whether application is web hosted or self-hosted	
Agenda view: split screen (as in a Word document map)	

Table/grid format	
Links and access to related supporting documents	
Searchable, secure archives	
OCR, searchable	
Publication: advanced access for Councilmembers with secure log-in, also members of other meeting bodies for their meetings	

D. Meeting Minutes Feature	
Integration with Granicus	
Electronic routing and electronic signature post meeting documents	
Electronic dispensation of documents (to newspaper, to storage archive)	
Integration with Municode	
Future add-on component capabilities	

E. Granicus Letter of Integration Verification	