

Attachment V: Proposal Template

ATTACHMENT V: PROPOSAL TEMPLATE

REQUEST FOR PROPOSALS FOR LEGISLATIVE MANAGEMENT SYSTEM (LMS) RFP#BOS2017-01

CONTACT: Wilson L. Ng, (415) 554-5184

Proposals received under this RFP that fail to address each of the requested items in this Attachment V, Proposal Template in sufficient and complete detail to substantiate that the Proposer can meet the City's Minimum Qualifications will not be considered. Note that responses of "To be provided upon request" or "To be determined" or the like, or that do not otherwise provide the information requested (left blank) are not acceptable.

Instructions are provided in blue and may be deleted. Please complete your proposal in the template provided, using as much space as needed. Indicate clearly where separate documents are provided. In order to receive the maximum amount of points, please be sure to follow this format carefully and thoroughly (but concisely) address each section. Please ensure your response meets the Minimum Qualifications so that it will be evaluated.

Note that all documents under this RFP process are subject to public disclosure. Please redact confidential or proprietary information as appropriate.

A. Executive Summary

1. Proposer Information and Partner(s)

Proposer's Name	
Proposer's Address	
Location of Proposer's Office to Perform Services under this RFP	
Proposer's Website Address	
Proposer's City Vendor ID	<i>Note: Possession of this number serves as partial verification that the Proposer has completed the City's administrative requirements (see Attachment III, Section A for more details).</i>
Proposer's Partner(s) Name(s)	

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2. **RFP Contact**

Clearly identify the person that will serve as the overall RFP contact. This person will receive e-mail notifications regarding the RFP process.

Name	
Title	
Email	
Phone	
Fax	
Address	

3. **Service Area**

Confirm the service area your firm is seeking to provide.

- Service Area: Legislative Meeting Management

4. **How did you find out about this RFP Opportunity?**

Insert Response Here.

5. **Pending Litigation**

Briefly describe any litigation or pending litigation related to services provided by your firm within past three years of this RFP issue date. If none, state "None."

Insert Response Here.

6. **Service Organization Auditing and Reports on Controls**

Provide Statement on Standards for Attestation Engagements (SSAE) SSAE-16 status and American Institute of Certified Public Accountants' (AICPA) Service Organization Control (SOC) SOC-1, SOC-2, SOC2+ reports, as available, with response.

Insert Response Here.

7. **Clients Relationships Severed for Reasons Other than Convenience**

Provide a list of your clients where the contractual relationship was not completed and was severed for reasons other than convenience. A brief description of why the relationship was severed and the name of the client and the client's project manager are also required. If none, state "None."

Insert Response Here.

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B. Minimum Qualifications

The Minimum Qualifications are used by the City to determine whether the Proposer and the proposed staff identified to complete all tasks specified in the scope of work have had experience on projects comparable to the services the City is requesting. Any proposal that does not demonstrate that the Proposer meets these minimum qualifications by the proposal deadline will be considered non-responsive and will not be evaluated or eligible for award of any subsequent contract(s). Be sure to complete this section, as described.

1. Proposer Certification

The Proposer certifies that:

A. RFP ATTACHMENTS:

A.1 It has completed the requirements and submitted the forms described in RFP Attachments I, II, III, IV, V, and VI as part of Proposal, as applicable.

Yes

A.2 It has provided audited financial statements for the past two (2) calendar or fiscal years with a certified opinion of financial solvency from a certified public accountant or accountancy firm.

Yes

B. EXPERIENCE:

B.1 It has submitted a Minimum of one (1) Prior Project Description, clearly demonstrating successful completion of a Legislative Management System implementation within three (3) years of the date of this RFP (successful completion means project outcomes have been assessed by client). The City reserves the right to contact the client to confirm the level of project completeness and acceptance.

Yes

B.2 It has submitted a minimum of one (1) Project Plan that includes a detailed project plan similar to Legislative Management services requested by the City, clearly demonstrating successful completion within the last three (3) years of the date of this RFP (successful completion means project outcomes have been assessed by client).

Yes

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2. *Prior Project Description(s) and Project Plan(s)*

Using the following template, Proposers must submit a minimum of one (1) and a maximum of two (2) Prior Project Description(s) and a minimum of one (1) and a maximum of two (2) Project Plan(s) of a project completed within three (3) years of the date of this RFP, in accordance with the Minimum Qualifications stated above.

Contacts for each project are required and may serve as references for the Proposer. The City will not inform Proposers when references will be contacted. The Proposer should ensure that client contact information listed in the response is up-to-date and should notify clients that the City may be contacting them. See RFP Attachment I, Section 14.

Failure to provide the information as requested will result in rejection of your proposal.

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LEGISLATIVE MANAGEMENT SYSTEM PRIOR PROJECT DESCRIPTION 1 (REQUIRED)

Project	<i>Project Name</i>
Client	<i>Client Name (City, County, etc.)</i>
Client Unit	<i>Client Agency, Department, or Unit Name</i>
Client Contact Name and Title	
Client Contact Phone	
Client Contact E-mail	
Timeline	<i>Month/Year to Month/Year; Length of project beginning to end (Project must be within three (3) years from the date of this RFP)</i>
Consultant Firm Name	
Consultant Lead(s)	<i>Staff Lead Name(s) – same as lead proposed to City?</i>
Fee	<i>\$00,000.00</i>
Number of Hours	<i>XX hours</i>

Project Background Include background information regarding the client and/or program, as applicable. What were the goals and desired outcomes of your services? How were they similar or different from the intent of the project described in this RFP?

Insert Response Here.

Project Scope What were the project activities your firm completed? How were they similar or different from what is described in this RFP? Provide sufficient information to give the City insight into the size/complexity and scope of the project.

Insert Response Here.

Project Approach How did you approach the project? What methodologies were used, and how did those address the project goals? Describe any challenges you have faced, including strategies you used to address them. Were you able to complete the project on time and within budget?

Insert Response Here.

Project Staffing Identify each key person on the project team with titles and roles and hourly rate, including all subcontractors. Include brief narrative descriptions of the responsibilities each person had on the project.

Insert Response Here.

Involvement of Client and/or Stakeholders Discuss how client and any stakeholders were involved in the project, major opportunities for input, client staff contributions, etc.

Insert Response Here.

Project Outcomes What, if any, measurable service deliverables or outcomes can be attributed to your services? How did you add value to the client? Examples include but are not limited to the amount of cost savings as a result of services provided, legislative or policy changes, organizational changes, or other measurable indicators of successful implementation of findings from your services.

Insert Response Here.

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LEGISLATIVE MANAGEMENT SYSTEM PRIOR PROJECT DESCRIPTION 2 (OPTIONAL)

Project	<i>Project Name</i>
Client	<i>Client Name (City, County, etc.)</i>
Client Unit	<i>Client Agency, Department, or Unit Name</i>
Client Contact Name and Title	
Client Contact Phone	
Client Contact E-mail	
Timeline	<i>Month/Year to Month/Year; Length of project beginning to end (Project must be within three (3) years from the date of this RFP)</i>
Consultant Firm Name	
Consultant Lead(s)	<i>Staff Lead Name(s) – same as lead proposed to City?</i>
Fee	<i>\$00,000.00</i>
Number of Hours	<i>XX hours</i>

Project Background Include background information regarding the client and/or program, as applicable. What were the goals and desired outcomes of your services? How were they similar or different from the intent of the project described in this RFP?

Insert Response Here.

Project Scope What were the project activities your firm completed? How were they similar or different from what is described in this RFP? Provide sufficient information to give the City insight into the size/complexity and scope of the project.

Insert Response Here.

Project Approach How did you approach the project? What methodologies were used, and how did those address the project goals? Describe any challenges you have faced, including strategies you used to address them. Were you able to complete the project on time and within budget?

Insert Response Here.

Project Staffing Identify each key person on the project team with titles and roles and hourly rate, including all subcontractors. Include brief narrative descriptions of the responsibilities each person had on the project.

Insert Response Here.

Involvement of Client and/or Stakeholders Discuss how client and any stakeholders were involved in the project, major opportunities for input, client staff contributions, etc.

Insert Response Here.

Project Outcomes What, if any, measurable service deliverables or outcomes can be attributed to your services? How did you add value to the client? Examples include but are not limited to the amount of cost savings as a result of services provided, legislative or policy changes, organizational changes, or other measurable indicators of successful implementation of findings from your services.

Insert Response Here.

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LEGISLATIVE MANAGEMENT SYSTEM PROJECT PLAN 1 (REQUIRED)

Project	<i>Project Name</i>
Client	<i>Client Name (City, County, etc.)</i>
Client Unit	<i>Client Agency, Department, or Unit Name</i>
Client Contact Name and Title	
Client Contact Phone	
Client Contact E-mail	
Timeline	<i>Month/Year to Month/Year; Length of project beginning to end (Project must be within three (3) years from the date of this RFP)</i>
Consultant Firm Name	
Consultant Lead(s)	<i>Staff Lead Name(s) – same as lead proposed to City?</i>
Fee	<i>\$00,000.00</i>
Number of Hours	<i>XX hours</i>

Project Plan

Insert Project Plan Here or Attachment

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LEGISLATIVE MANAGEMENT SYSTEM PROJECT PLAN 2 (OPTIONAL)

Project	<i>Project Name</i>
Client	<i>Client Name (City, County, etc.)</i>
Client Unit	<i>Client Agency, Department, or Unit Name</i>
Client Contact Name and Title	
Client Contact Phone	
Client Contact E-mail	
Timeline	<i>Month/Year to Month/Year; Length of project beginning to end (Project must be within three (3) years from the date of this RFP)</i>
Consultant Firm Name	
Consultant Lead(s)	<i>Staff Lead Name(s) – same as lead proposed to City?</i>
Fee	<i>\$00,000.00</i>
Number of Hours	<i>XX hours</i>

Project Plan

Insert Project Plan Here or Attachment

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C. Proposer (and Partner) Firm Qualifications – 100 points

Even if using an alternative format for your responses, the following information must be included in the order specified to be scored appropriately.

1. **Company Profile**

REQUIRED INFORMATION	
1. Year company was founded	<i>Founding Year:</i>
2. Top 3 areas of expertise	<i>Expertise:</i>
3. Number of years delivering Legislative Management solutions	<i>Years (#):</i>
4. Number of employees	<i>Employees (#):</i>
5. Number of active projects directly related to Legislative Management solutions.	<i>Projects (#):</i>
6. Company structure – public or private	<i>Structure:</i>
7. Revenues generated last three fiscal years	<i>Revenues (\$):</i>
8. Net income last three fiscal years	<i>Profitable (yes/no):</i>
9. Please provide financial statements for a minimum to two (2) most recent fiscal years to support answers in 7 and 8.	<i>Attach</i>

2. **Firm History and Structure**

Briefly describe your firm, including history, number of years in business, organizational structure, ownership structure, names of principals, staff size and composition. Provide a brief overview of your company and areas of expertise that best demonstrates your ability to configure, manage, and support the needs of the Solution Area(s) to which you are responding.

Insert Response Here.

3. **Firm Experience**

Describe your firm's experience providing services to comparable large, complex, public sector clients.

Insert Response Here.

4. **Company Core Expertise**

Provide a brief overview of your company and areas of expertise that best demonstrates your ability to configure, manage, and support the needs of the Solution Area(s) to which you are responding, including analysis of business needs and gap identification.

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Insert Response Here.

5. Relevance of Prior Project Description to Services under this RFP

Describe how your firm's prior projects are relevant to the services requested in this RFP.

Insert Response Here.

6. Capacity and Resources

Describe your firm's general capacity and local resources to provide the services under this RFP.

Insert Response Here.

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D. Proposed Staff Qualifications – 100 points

Even if using an alternative format for your responses, the following information must be included in the order specified to be scored appropriately.

As previously noted in RFP Attachment I:

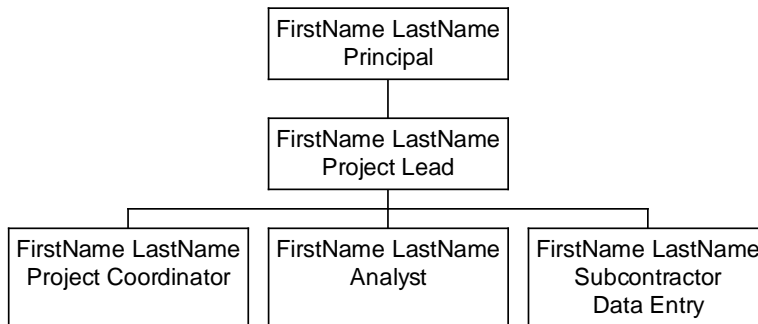
- If Proposer is selected for a contract, the City will contractually obligate the Proposer to assure that the key individuals listed and identified in the Proposal will be performing the work and will not be substituted with other personnel or reassigned to another project by the Proposer/Contractor without the City's prior approval or request. The City, in its sole discretion, shall have the right to review and approve all staff assigned to provide services throughout the duration of the contracts negotiated under this RFP. If selected for interviews, the Proposer's key individuals, including partner/subcontractor representatives, will be required to meet with the City prior to selection for contract negotiations.
- The selected Proposer(s) will be expected to take the lead role in project management and staff/subcontractor coordination. Proposals should factor this assumption into pricing.
- The City has approval rights over the use of all subcontractors. Proposer must identify all subcontractors in its proposal and these subcontractors must conform to all City policies regarding subcontractors.

1. Staffing Structure

Describe the staffing structure proposed for services under this RFP, including a proposed staff organization chart.

Insert Response Here.

The organization chart should be in graphic format as follows (example only). The organization chart should include sufficient detail on the staff levels to be assigned to the services by specialization, as appropriate.



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2. Staff Roles, Responsibilities, Qualifications, and Education

Expanding on the proposed staff organization chart information provided above, use the following tables or alternative format to provide detailed narrative information on the proposed project roles and responsibilities, qualifications, and educational background of project principals and key staff members, **including subcontractor staff**, proposed to perform services for the City. Identify each member on the project team, including but not limited to the functional and technical leads as well as supporting administrative staff. Include as many tables as needed.

Name, Title	<i>Insert Response Here.</i>
Proposed Role and Responsibilities	<i>Insert Response Here.</i>
Experience	Describe the proposed individual's experience with services requested by the City. <i>Insert Response Here.</i>
Education	Describe the proposed individual's educational background and training. <i>Insert Response Here.</i> <i>Insert other qualifications or educational background narrative here, or indicate if resume or CV is attached.</i>

Name, Title	<i>Insert Response Here.</i>
Proposed Role and Responsibilities	<i>Insert Response Here.</i>
Experience	Describe the proposed individual's experience with services requested by the City. <i>Insert Response Here.</i>
Education	Describe the proposed individual's educational background and training. <i>Insert Response Here.</i> <i>Insert other qualifications or educational background narrative here, or indicate if resume or CV is attached.</i>

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Name, Title	<i>Insert Response Here.</i>
Proposed Role and Responsibilities	<i>Insert Response Here.</i>
Experience	Describe the proposed individual's experience with services requested by the City. <i>Insert Response Here.</i>
Education	Describe the proposed individual's educational background and training. <i>Insert Response Here.</i> <i>Insert other qualifications or educational background narrative here, or indicate if resume or CV is attached.</i>

3. Continuity of Qualified Staff

Describe your firm's commitment to providing continuity of qualified staff through completion of contract.
Insert Response Here.

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E. Project Approach – 200 points

Describe your firm’s proposed approach to services and activities described in Section 2, Scope of Work of the RFP. Even if using an alternative format for your responses, the following information must be included in the order specified to be scored appropriately.

For reference please note the Service Area Specific Approaches must match the Service Area selected in Question 3 “Service Area” under Section A “Executive Summary” above.

1. **General Work Plan/Approach**

(Must be completed by **all** Proposers)

Describe your general work plan/approach for the project tasks, including associated activities and deliverables, to successfully complete the Scope of Work. Include the following information:

- Methodology used for project management.
- Overall scope of work tasks.
- Schedule and implementation timeline
- Assignment of work within your firm’s work team.
- A schematic or system architect diagram representation of the hardware/software solution.
- A list of all required hardware. Please provide specifications for each item.
- A list of all required software. Please indicate the use of each of the software or hardware items required to run the system.

Insert Response Here.

2. **Ability to Complete Project in a Timely Manner**

Describe your firm’s ability to complete the project in a timely manner

Insert Response Here.

3. **Client Involvement or Level of Effort**

(Must be completed by **all** Proposers)

Describe your firm’s expectations and/or assumptions of the City’s involvement or level of effort, including review, approval and other communication protocols necessary to successfully complete the services.

Insert Response Here.

Provide a list of questions you would need answered and the data or other City resources you would need access to or to be provided by the City to successfully complete the services.

Insert Response Here.

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4. **Competitive Differences**

(Must be completed by all Proposers)

What makes your firm's approach to the services different or more effective than other firms providing the same services? Describe any other asset, expertise, experience, data or technology that provides your firm with a competitive edge or advantage that will provide a benefit to your clients. Include any lessons learned.

[Insert Response Here.](#)

5. **Service Area Specific Approaches**

Company Core Expertise

Provide a brief overview of your company and areas of expertise that best demonstrates your ability to configure, manage, and support the needs of the Solution Area(s) to which you are responding, including analysis of business needs and gap identification.

[Insert Response Here.](#)

Company Delivery Methodologies

Explain the processes, practices and methodologies that your firm plans to leverage to deliver configuration, testing environments and management of the Solution Area(s) to which you are responding.

[Insert Response Here.](#)

Company Training Methodologies

Explain the processes, practices and methodologies that your firm plans to leverage to deliver training to customers, configuration, and management of the Solution Area(s) to which you are responding.

[Insert Response Here.](#)

6. **Solution Description and Documentation**

Licensing

Describe the cost and method of calculation for all proposed software licensing, for example per seat, or calculated based on some volume of output, etc.

[Insert Response Here.](#)

Data

1. Provide the data dictionary and schema used by the system(s)

[Insert Response Here.](#)

2. Describe ability to import and export data

[Insert Response Here.](#)

3. Describe intended method of importing our legacy data

[Insert Response Here.](#)

System Availability

1. Describe the process for change management.

[Insert Response Here.](#)

2. Describe customer notification process for scheduled maintenance, including description of historical maintenance for the last 18 months, and planned maintenance windows for the next 12 months.

[Insert Response Here.](#)

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3. Provide a summary of unscheduled outages that have impacted your customers within the last 18 months, if applicable. Include the time, duration, and description of the outages.

Insert Response Here.

4. Provide the company escalation and response plan, and describe how issues are triaged and escalated.

Insert Response Here.

5. What service-level agreements (SLA) do you support?

Insert Response Here.

6. Once deployment is complete, describe the process and service levels for any defects or issues found and reported.

Insert Response Here.

7. What is your expected system availability percentage?

Insert Response Here.

Fault tolerance

1. Describe your methodology for fault tolerance including time to recover and how much work will be lost including

- a. San Francisco City Hall having an extended internet outage
- b. Any system hardware or data at San Francisco City Hall is permanently lost
- c. A primary cloud-based site has an outage
- d. A primary cloud-based site has an outage where all data is permanently lost

Insert Response Here.

Integration points

1. Describe your solution, is it a single solution, or does it include multiple vendors? If so what are the integration points?

Insert Response Here.

2. If multiple vendors are involved describe the support mechanisms and escalation paths.

Insert Response Here.

Application Security

1. Describe your solution's authentication methods, including any ability to integrate with Lightweight Directory Access Protocol (LDAP) and Active Directory.

Insert Response Here.

2. Describe how the solution provides audit trail and how privileged use is recorded.

Insert Response Here.

3. Describe the levels of security and how privileges are established.

Insert Response Here.

4. Describe inactivity timers.

Insert Response Here.

5. Describe user of electronic signatures, or any other use of in-application authentication.

Insert Response Here.

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F. Project Cost – 300 points

1. *Cost Proposal*

The City seeks proposals demonstrating an efficient, effective approach with measurable deliverables and outcomes.

The City intends to award a contract to the Proposer(s) that will provide the best overall Proposal(s) to the City inclusive of qualifications and cost considerations. The City reserves the right to accept other than the lowest cost and to reject all proposals that are not responsive to this RFP.

- The City recognizes that estimating costs may be difficult and is asking Proposers to state their assumptions. Proposers should estimate staff hours and levels of effort based on previous experience with projects similar in size and scope of this RFP.
- The City will negotiate costs and work effort with the selected Proposer to develop a firm fixed price for the contract utilizing a blended hourly rate to compensate Proposer for all services, travel, lodging, meals, miscellaneous and any other expenses related to the completion of services. Additional and separate cost reimbursement will not be provided by the City.
- Note that hourly rates provided shall apply to any and all as-needed services requested by the City for the full contract period under this RFP, as applicable. Please see RFP Attachment I, Section 13.

A spreadsheet or table format is preferred with sufficient detail for the City to determine the justification for what is being included. Provide a total Cost Proposal of 2) project and implementation costs, and 2) ongoing annual costs, for the Service Area with a breakdown of:

1. Number of hours and cost per activity or deliverable described in Section 2, Scope of Services of this RFP;
2. Standard hourly billing rates by staff name/role with the estimated percentage of overall team effort each staff person would allocate to the project;
3. Total number of hours; and
4. Total cost for all services under this RFP.