

## Attachment VI: Functional & Technical Expectations

# Attachment VI – Legislative Management System Functional and Technical Expectations

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## Attachment VI – Functional and Technical Expectations

For each of the functional and technical areas, Proposers should specify whether or not their proposed solution can meet the following expectations. If an expectation cannot be fully met by an out-of-box, readily available, solution due to required customizations, Proposers should attach a description of the scope and timing as part of their submission. Additional costs for customizations, if any, should be separately included on the price proposal; hourly rates and itemized costs must be included to negotiate changes in the scope of work if necessary. If work will require a subcontractor or third party in order to meet expectations, please specify.

### 1. Functional Expectations

#### 1.1 Public Participation

- 1.1.1 The system can manage public comments submitted via paper; spoken during a meeting; submitted electronically through the web, including audio and video files; and associate them with legislative items.
- Yes     No
- 1.1.2 The system can provide a public web portal that allows the user to create a profile; to search; save searches; create e-mail alerts based on searches and manually selected legislative items; create reports and portal widgets based on search criteria; and allow alerts to be based on a change of state of an item, such as “Assigned to Committee” or “Vetoed by Mayor”.
- Yes     No
- 1.1.3 The system can provide to the public easy export; based on search results; providing legislative items at the field level of all legislative into applications such as Microsoft Excel and Microsoft Word. It shall also be easy to export attachments to items.
- Yes     No
- 1.1.4 The system can make searches and information available in a direct machine-to-machine data connection, for both internal and external users using industry standard formats such as JSON (JavaScript Object Notation), XML (Extensible Markup Language), and an open API (Application Program Interface).
- Yes     No
- 1.1.5 The system's public web interface accommodates display of different languages and characters and automated translation.
- Yes     No

#### 1.2 Legislative Item (File) Management

- 1.2.1 The system can support the current elements of our “files” or legislative items, supporting for example our numbering system automatically (YYNNNN or 170001, 170002, etc., where YY is the last two digits of the current year and NNNN is the sequential number of the series); statuses (Assigned to Rules Committee, Vetoed by Mayor, etc.); our dual titling system with both a short title (up to 150 characters) and a long title; enactment numbers (NNNN-YY so 0001-17, 0002-17, etc.).
- Yes     No

- 1.2.2 The system can maintain versions of legislative items including version numbers, and an easy way to identify changes to the text and the author of the changes: a committee; the City Attorney; The Board, etc. The system can support comparing consecutive and non-consecutive versions' differences and identifying authors.
- Yes  No
- 1.2.3 The system can support designating file types to an item such as: ordinance; charter amendment; resolution; etc.
- Yes  No
- 1.2.4 The system can support a default voting rule for each file type. This rule must be able to be overridden.
- Yes  No
- 1.2.5 The system can record and maintain a history of the states of the item: such as introduced; Pending Committee Action; Passed; etc.
- Yes  No
- 1.2.6 The system can attach attachments to items including video and audio files even if large. Text based attachments are automatically converted to .PDF format and are automatically made ADA (Americans with Disabilities Act) compliant. The system can handle large page dimensions, for example blueprints.
- Yes  No
- 1.2.7 The system can support associating a file with a geographic point or a geographic area.
- Yes  No
- 1.2.8 The system can support associating various data and metadata to items such as recording votes; prior votes in committee(s); sponsors; co-sponsors; code section citation; requestor, and other metadata.
- Yes  No
- 1.2.9 The system can support attaching notes to an item.
- Yes  No
- 1.2.10 The system can support spell-check.
- Yes  No

### 1.3 Meeting Management

- 1.3.1 The system can schedule meetings and maintain a calendar on the web.
- Yes  No
- 1.3.2 The system allows the authorized user to choose a voting order before each meeting (Board rules rotate the order of voting each meeting).
- Yes  No
- 1.3.3 The system can record the votes with different members from one item to another within the same meeting.
- Yes  No

- 1.3.4 Vote rules can be manually overridden. Votes can be corrected in the event of special vote thresholds.  
 Yes  No
- 1.3.5 The system can record during a meeting, in a manner which can be used to create minutes, events such as votes; motions; members absent; member excused.  
 Yes  No
- 1.3.6 The system can record the time a meeting started and ended; time recessed and reconvened.  
 Yes  No
- 1.3.7 The system can timestamp the start of each item – even if the item is called out of order from the agenda.  
 Yes  No
- 1.3.8 The system can cancel a meeting and have cancelled meeting information on the calendar.  
 Yes  No

#### 1.4 **Agenda and Minutes Management**

- 1.4.1 The system can generate agendas for all body types.  
 Yes  No
- 1.4.2 Both agendas and minutes have flexible ability to insert stored paragraphs.  
 Yes  No
- 1.4.3 The system can allow a user to change the look and feel of templates for an agenda or minutes easily without cost.  
 Yes  No
- 1.4.4 The system allows authorized users to modify automatically-generated agendas, giving the users total discretion to include or exclude legislative matters and change the order of legislative matters.  
 Yes  No
- 1.4.5 The system can provide default content which can be all items either already scheduled for that meeting date, or eligible to be put on the agenda.  
 Yes  No
- 1.4.6 The system allows authorized users to modify automatically-generated agendas, giving the users total discretion to include or exclude legislative matters and change the order of legislative matters.  
 Yes  No
- 1.4.7 The system can assign all legislative matters on an agenda sequential agenda numbers during the report generation process. These are separate from the File Number. They indicate an order on the agenda. These item numbers can carry the same numbering through to the corresponding minutes, but not to the Summary of Action (Tails) report.  
 Yes  No

1.4.8 The system can use past tense language for recorded legislative actions.

Yes  No

1.4.9 The system can allow authorized users to add and delete members from body rosters for a specific meeting quickly and easily both prior to and during a meeting. The system can then automatically display the proper roster for use in recording attendance and votes in the corresponding body minutes.

Yes  No

## 1.5 Search and Subscribe

Unless otherwise noted, all items in this section apply both to internal users of the system and anyone accessing the system via the public website.

1.5.1 The system can provide search logic that support advanced and forgiving searches. (e.g. Fuzzy, Soundex, Synonym, Phonetic, Boolean, Wild Card, “did you mean...”) as well as options to create specific and targeted search queries.

Yes  No

1.5.2 The system allows users to name and save a search term or complex query for future use.

Yes  No

1.5.3 The system can allow users to select a set of items as a dynamic search result, and individually selected set of items or a combination of the two.

Yes  No

1.5.4 The user can subscribe to a set of items and select a set of actions (Introduced; Referred to Committee, etc.) and receive e-mail notifications when their item has changed state based on business rules and user preferences.

Yes  No

1.5.5 The same subscription can also be made available in RSS format.

Yes  No

1.5.6 The user can export items in common formats such as XML, MS Excel, CSV, RTF/MS Word and formatted PDF.

Yes  No

## 1.6 Printed Items

Examples of printed items can be found in Attachment IX – Report and Output Examples and some on the Board of Supervisors website <http://www.sfbos.org>

1.6.1 In addition to on-screen presentation, the system can print in substantially the same format we have today, the reports contained in Attachment X: Legislative Output – Reports & Examples.

Yes  No

## 1.7 Legislative Bodies, Boards Commissions and Task Forces

- 1.7.1 This system can support the creation of any number of bodies including: boards; committees; commissions; task forces; special sessions (special meetings combining two bodies or otherwise having a unique set of members), and can differentiate between advisory bodies and policy bodies.
- Yes  No
- 1.7.2 The system can track and retain the date range of the time someone sat on a body or bodies and all the legislative or advisory activity of that member, such as attendance.
- Yes  No
- 1.7.3 The system allows for capturing, displaying and printing in reports various descriptive data and metadata as appropriate for each body such as: enabling code or ordinance; authority; rules for appointments; qualifications; number of voting members; number of alternate members; compensation; appointment information; indemnification (applies to chartered commissions); officers; attendance requirements; officers; procedures; purpose; seat qualifications/prerequisites; vacancies; term information (maximum numbers of years a person can serve in a body); whether terms can be waived; term duration; city staff liaison/contact; assigned attorney; maximum allowed consecutive terms; whether the body meets or does not meet; default meeting location; default meeting frequency and location; meeting time; body active from date; body inactive to date; contact information; type of body (board; trust; agency, etc.).
- Yes  No
- 1.7.4 The system can track and retain the date range of when someone sat on a body.
- Yes  No
- 1.7.5 The system can capture various compliances (Annual Reports; Oath; Ethics; Real Property; Form 700 - Statement of Economic Interest disclosures; Financial Disclosures; Employment; etc.) and the forms that need to be submitted for each of these for each of the bodies.
- Yes  No
- 1.7.6 The system can capture various waivers and votes required for waiving them. (Waivers are: excessive absences, terms, employment, residency, etc. and require votes according to business rules)
- Yes  No
- 1.7.7 The system provides tracking and management of applications to eligible bodies (boards, commissions, etc.) to capture the personal information of applicant to a body.
- Yes  No
- 1.7.8 The system can allow applicants to submit applications through a public-facing, web-based system
- Yes  No
- 1.7.9 The system can present, based on configurable business rules, body-specific verbiage on agendas, minutes and other documents.
- Yes  No
- 1.7.10 The system can produce a report in compliance with California Government Code section 54972:

*54972. On or before December 31 of each year, each legislative body shall prepare an appointments list of all regular and ongoing boards, commissions, and committees which are appointed by the legislative body of the local*

agency. This list shall be known as the Local Appointments List. The list shall contain the following information:

(a) A list of all appointive terms which will expire during the next calendar year, with the name of the incumbent appointee, the date of appointment, the date the term expires, and the necessary qualifications for the position.

(b) A list of all boards, commissions, and committees whose members serve at the pleasure of the legislative body, and the necessary qualifications for each position.

Yes     No

1.7.11 The system can produce a report similar to the report required by California Government Code section 54972, but showing all active members as well as vacancies on any given date for one or more bodies.

Yes     No

1.7.12 The system can track transmittals to the Board of Supervisors to the Clerk of the Board and other city officials from various bodies.

Yes     No

1.7.13 The system can generate welcome emails to new appointees and staff.

Yes     No

## 1.8 Audio and Video

A separate department, San Francisco Government Television (SFGovTV) provides video services for the entire City. The San Francisco Board of Supervisors and committees use their services for video recording, editing, transcoding, and closed-captioning. The expectations below assume an integration with SFGovTV. A standalone video solution is not a requirement of this project.

1.8.1 The system can associate audio, video, and closed captioning files and links with agendas.

Yes     No

1.8.2 The system can associate audio, video, and closed captioning files and links to minutes.

Yes     No

1.8.3 The system can associate items in minutes such that the videos broadcasted by SFGovTV ([www.sfgovtv.org](http://www.sfgovtv.org)) will be linked and referenced to that item.

Yes     No

1.8.4 The system can associate items in minutes such that the audio broadcasted by SFGovTV ([www.sfgovtv.org](http://www.sfgovtv.org)) will be linked and referenced to that item.

Yes     No

1.8.5 The system can associate transcript files to minutes.

Yes     No



1.8.6 The system can export files in such a way that other services (SFGovTV who use Granicus) can associate minute items with time markers.

Yes  No

## 1.9 Submission Interface

1.9.1 The system can provide a web based interface for submission of legislative items by Departments to the Clerk of the Board.

Yes  No

1.9.2 The system can manage add/change/delete templates and workflows for various legislative item types.

Yes  No

1.9.3 The system can provide the ability to attach notifications to various legislative item types.

Yes  No

1.9.4 The system can provide an ability to create a checklist of necessary attachments by legislative item type.

Yes  No

1.9.5 The system can record when an item is received and the checklist legislative item is satisfied.

Yes  No

1.9.6 The system can be integrated with e-mail such that a checklist item can be automatically marked as complete based on sender and/or text in a subject line.

Yes  No

1.9.7 The system can show that a checklist item was marked complete by a manual vs. automatic process.

Yes  No

1.9.8 The system allows a user to compare any two versions of the same legislative item, with text of legislation displayed in its entirety.

Yes  No

1.9.9 The comparison can show version control of the document on pleading paper with "redline" that contains line-by-line numbering.

Yes  No

1.9.10 Amendments to legislation can note the author of the amendment (a sub-committee, a supervisor, the City Attorney).

Yes  No

1.9.11 During document comparisons, changes can indicate the author and version number where the change was introduced.

Yes  No

## 1.10 System administration

- 1.10.1 The system can create and manage potentially an unlimited number of bodies, such as boards, committees, commissions, etc.
- Yes     No
- 1.10.2 The system allows authorized users to: create bodies; create members; add and remove members from bodies.
- Yes     No
- 1.10.3 The system can support multiple configurable calendars.
- Yes     No
- 1.10.4 The system is configurable to be able to apply different calendars for each body.
- Yes     No
- 1.10.5 The system can create record of people who sit on boards and committees.
- Yes     No
- 1.10.6 The system is configurable to count "hold" days on items (e.g. 30-day hold rule)
- Yes     No
- 1.10.7 The system can create users and assign to groups/user roles and according to business rules give them read only, read-write, or administrative access at a granular and user interface level for example if a function is available or if a menu item is visible.
- Yes     No
- 1.10.8 An authorized user can create and modify all report templates, including but not limited to agenda; legislation introduced; draft minutes; final minutes; tails; certified copy; matter summary; master report; pending list.
- Yes     No
- 1.10.9 The system can import code sections with Section, Section Name and Description and items may be associated with one or more.
- Yes     No
- 1.10.10 The administrator can maintain a list of subjects and items that may be associated with one or more.
- Yes     No
- 1.10.11 The system allows the System Administrator to configure legislative actions.
- Yes     No
- 1.10.12 The system allows the source and password from Microsoft Active Directory to be the source for Authorizations and Passwords for the system.
- Yes     No
- 1.10.13 The system maintains a data entry log identifying, without limitation: user name, field modified, field contents before entry, field contents after entry, and date and time of entry.

Yes     No

1.10.14 The system can allow the System Administrator to create and modify standard paragraphs for use in agendas, minutes, and other documents.

Yes     No

1.10.15 The system can support a password length of up to 20 characters.

Yes     No

## 2. Technical Expectations

### 2.1 General

2.1.1 Web components of the system are based on proven state-of-the-art technologies, such as HTML5 browser-based, server-side architecture, configurability, and of industry-standard database, operating systems, and programming platforms.

Yes     No

2.1.2 The system has web-enabled components of the application that meet the Rehabilitation Act of 1973 Section 503, World Wide Web Consortium (W3C) and industry standards for graphics and design; speed; reliability; and security for dynamic content and user interaction.

Yes     No

2.1.3 The system can integrate with current and future applications using web services, file import/exports and Application Program Interface's (API) from both the City and external parties including but not limited to CSV (Comma Separated Values), Excel, JSON (JavaScript Object Notation), XML (Extensible Markup Language) and SQL (Structured Query Language).

Yes     No

2.1.4 The system can format email messaging compatible with the City's e-mail systems (Microsoft Outlook/Outlook365/Exchange, Lotus Notes).

Yes     No

### 2.2 Application Architecture

2.2.1 The system can provide a Graphical User Interface (GUI).

Yes     No

2.2.2 The system can provide all screens, reports and transactions through a web browser.

Yes     No

2.2.3 Operates properly independent of device e.g. PC, Mac, Android, iPhone, iPad etc.

Yes     No

2.2.4 Operates properly independent of browser, e.g. Internet Explorer, Safari, Google Chrome, Firefox.

Yes     No

- 2.2.5 Supports multiple languages for input and automated translation.  
 Yes     No
- 2.2.6 The system can provide user-defined: fields; business rules and workflows.  
 Yes     No
- 2.2.7 The system has the cut and paste capability from data fields and screens to other applications.  
 Yes     No
- 2.2.8 The system provides electronic signature capabilities and functionality.  
 Yes     No
- 2.2.9 The system supports multiple languages for input and automated translation.  
 Yes     No

### 2.3 System Stability and Reliability

- 2.3.1 The system can produce predictable and reproducible results.  
 Yes     No
- 2.3.2 The system allows multiple users to use the same items / minutes / agendas, etc. without interfering or changing each other's work  
 Yes     No
- 2.3.3 The system, through messaging or otherwise, can prevent race conditions in statuses or states of items, including files (legislative items), minutes, agendas, etc.  
 Yes     No
- 2.3.4 Saved work can be the same when retrieved as when saved according to business rules.  
 Yes     No
- 2.3.5 The system's global reports, including agendas, minutes, etc., can print identically by any user on the system provided no underlying data has changed and user has adequate access rights.  
 Yes     No
- 2.3.6 The system can provide error messages in plain English, and informative enough for a user or administrator to understand.  
 Yes     No

### 2.4 Database Architecture

- 2.4.1 The system can accommodate separate instances of databases for testing, training, and quality assurance.  
 Yes     No

- 2.4.2 The system can perform data replication.  
 Yes  No
- 2.4.3 The system can encrypt sensitive data using industry standard encryption methods.  
 Yes  No
- 2.4.4 The system has the ability to exchange database information using industry accepted standards and formats (e.g. SQL (Structured Query Language), CSV (Comma-Separated Values), XML (Extensible Markup Language), JSON (JavaScript Object Notation)).  
 Yes  No
- 2.4.5 The system can automatically lock, as necessary, a record when it is being updated by a user so that another user is unable to perform a simultaneous update of that record.  
 Yes  No
- 2.4.6 The system can perform database maintenance, including, but not limited to, backup and upgrades without requiring system downtime.  
 Yes  No

## 2.5 **Data Conversion and Migration**

- 2.5.1 The system can import all data from the current legislative management system.  
 Yes  No
- 2.5.2 The system can retain all history of for all legislative items at the field level and be searchable in the system just as newly created items are searchable.  
 Yes  No
- 2.5.3 The system can allow for searching through imported data in the same way it allows searching through new files, including by file number, keyword, short title, long title, body text.  
 Yes  No
- 2.5.4 The system can retain all versions of all editions of legislation.  
 Yes  No
- 2.5.5 The system can retain all individual files and attachments as separate files.  
 Yes  No

## 2.6 **Security and Authentication**

- 2.6.1 The system provides access to system functionality through Internet Explorer, Firefox, Chrome and Safari web browsers.  
 Yes  No

- 2.6.2 The system complies with all applicable City mandated security protocols and standards.  
 Yes     No
- 2.6.3 The system provides adequate security and protection of data covered by applicable regulatory or other compliance requirements.  
 Yes     No
- 2.6.4 The system provides redundancy and load balancing for firewalls, intrusion prevention, and other critical security elements  
 Yes     No
- 2.6.5 The system can provide the ability to automatically log users off the system when there has been no activity for a pre-defined period.  
 Yes     No

## 2.7 System Capacity and Performance

- 2.7.1 The system can provide the ability to track and log system uptime and transaction response times in order to provide information for SLA monitoring.  
 Yes     No
- 2.7.2 Even complex searches should complete in under five seconds, for example a full text search of the data fields in legislative records including, but not limited to, File ID #, File Name, Title, File Type, Status, Controlling Body, Sponsor, Requester, Effective Date, Agenda Date.  
 Yes     No

## 2.8 Business Continuity and Disaster Recovery

- 2.8.1 The system can provide full recovery and system backup capabilities for all transactions according to pre-defined timeframes.  
 Yes     No
- 2.8.2 The system can provide the ability to restore transactions and data.  
 Yes     No
- 2.8.3 The application and data will be designed to be able to be tested to be compliant with the CCSF Disaster Preparedness, Response, Recovery and Resiliency Policy (DPR3).  
 Yes     No
- 2.8.4 Capability to replicate the database in near real-time and make the backup the primary, according to configurable business rules e.g. upon a command, automatically.  
 Yes     No
- 2.8.5 The system can be designed so that data is not lost in the event of any system failure or system component failure regardless of the cause of failure.  
 Yes     No

2.8.6 All functionality needed to make agendas, run meetings and make minutes and all other reporting can be done even if there is an extended internet connection failure.

Yes     No