



City and County of San Francisco

Clerk of the Board
Board of Supervisors

REQUEST FOR PROPOSALS FOR Legislative Management System RFP#BOS2017-01

CONTACT: Wilson.L.Ng@sfgov.org

Background

San Francisco is the fourth largest city in California and serves as a center for business, commerce and culture for the West Coast. The City and County of San Francisco (the "City") established by Charter in 1850, is a legal subdivision of the State of California with the governmental powers of both a city and a county under California law. The City's powers are exercised through a Board of Supervisors serving as the legislative authority, and a Mayor and other independent elected officials serving as the executive authority.

The Office of the Clerk of the Board's (COB) current Legislative Management System contract is set to expire in August 2018. In order to maintain excellent customer service, the department seeks to replace or upgrade an aging Legislative Management System with a stable, maintained and customized solution that will integrate seamlessly with our existing legislative process and data. This project also may include workflow and document management features.

The COB seeks responses from qualified firms demonstrating successful experience providing Legislative Management solutions that can meet the department and City's requirements.

Anticipated Contract Term

The anticipated contract term will be five (5) years, with the option to extend the contract for up to five (5) additional years. Actual contract term may vary, depending upon service and project needs at the City's sole, absolute discretion. Proposers selected must be available to commence work on or before July 1, 2018.

Anticipated Contract Budget

The anticipated not-to-exceed contract budget for implementation is \$390,000, with an annual not-to-exceed budgeted maintenance cost of \$30,000. The City seeks proposals demonstrating an efficient, effective approach with measurable program deliverables and outcomes.

Subcontracting Requirement

There is no S.F. Administrative Code 14B Local Business Enterprise (LBE) subcontracting requirement for this RFP or resulting contract. However, all Proposers must submit the forms required as part of RFP Attachment II. LBEs will be eligible for rating discounts in accordance with RFP Attachment II and are strongly encouraged to submit responses.

Schedule*

RFP Issued	04-11-2017
Pre-Proposal Conference	04-28-2017 (10am PT)
Deadline for RFP Questions	05-05-2017 (5pm PT)
Deadline for RFP Answers	05-12-2017 (5pm PT)
Deadline for RFP Proposals	06-09-2017 (5pm PT)

*Dates are subject to change.

Questions and Communications

Interested parties are directed NOT to contact any employees, agents, or officials of the City other than those specifically designated in this RFP and its Attachments. To ensure fair and equal access to information about this RFP, e-mail your questions to Wilson.L.Ng@sfgov.org.

Questions must be in writing and received by the Deadline for RFP Questions. No questions will be accepted after this time with the exception of City vendor requirement questions.

A summary of the questions and answers pertaining to this solicitation will be posted on City's website <http://www.sfgov.org> under Business – Bids & RFP's >>Consultants and Professional Services at the following URL: <http://mission.sfgov.org/OCABidPublication/ReviewBids.aspx>

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1. Introduction: Statement of Need and Intent

1.1 Background

San Francisco is the fourth largest city in California and serves as a center for business, commerce and culture for the West Coast. The City and County of San Francisco (the “City”) established by Charter in 1850, is a legal subdivision of the State of California with the governmental powers of both a city and a county under California law. The City’s powers are exercised through a Board of Supervisors serving as the legislative authority, and a Mayor and other independent elected officials serving as the executive authority.

1.2 The San Francisco Board of Supervisors

The San Francisco Board of Supervisors (BOS) is the legislative branch of government for the City & County of San Francisco. The Board responds to the needs of the people of the City & County of San Francisco, establishes policies, and adopts ordinances and resolutions.

Eleven district Supervisors each represent a geographical district of San Francisco and are supported by legislative aides, interns, and volunteers in their individual offices. For more information about BOS, please visit www.sfbos.org.

1.3 The Office of the Clerk of the Board

The Office of the Clerk of the Board, (COB, Clerk’s Office, Department) has a chartered duty to process and maintain legislation impacting the lives of over 800,000 San Franciscans. The COB processes over 1,400 legislative files/items on average annually and is subject to legal noticing requirements for meetings in accordance to state and local codes.

The mission of the Clerk's Office is to maintain the Board's legislative history and provide administrative support to the members of the Board of Supervisors in its response to the needs of the public.

San Francisco Charter, Section 2.108, states that the Board of Supervisors will liberally provide for the public's access to their government, meetings, documents and records. For more information about the COB, please visit www.sfbos.org/clerk-board.

1.4 The Project

In order to maintain excellent customer service, the COB seeks to replace or overhaul an aging and difficult to maintain Legislative Management System with a more stable, easily maintained and more easily customized solution. The COB’s current Legislative Management System contract is set to expire in August 2018.

The department seeks a solution that will integrate seamlessly with our existing legislative process and data. This project also may require customized features such as additional workflow and document handling. The department further seeks a comprehensive solution that answers the day-to-day operational needs as well as mission critical business processes – including, but not limited to agenda management, legislative drafting and submission, and document management.

The existing Legislative Agenda Management System utilized by the COB, has been in use since 1998. It is an on-premise software system, with significant amounts of customization done to meet specific procedural requirements and incorporate historical formatting requirements. The Agenda Management System software in use has been through upgrades and continued customizations to meet evolving needs and requirements, but there is a desire to

utilize and provide functionality, accessibility and technical options – to both staff and public - that are only available through up to date installation of a comprehensive Legislative Management system.

The primary goal of the project is to replace the existing Legislative Management solution with a more stable and easily managed solution that meets the system, business, and operational requirements and demands of the COB.

1.5 Business Goals

The City needs a new Legislative Management solution to:

1. Install a reliable and stable legislative management system that handles all the tasks of the current system.
2. Allow complete and seamless conversion of existing data from the current system.
3. Generate meeting agendas from defined criteria and preserve formatting requirements.
4. Generate meeting minutes from the agendas that are updated online during public meetings, and preserve formatting requirements.
5. Improve fault tolerance and disaster recovery speeds.
6. Enable better automated data transfer through APIs, XML, etc.
7. Create a user-friendly, web-based or web-enabled system that provides a better mobile experience.
8. Give consumers of the legislative information better tools to search and track items.
9. Facilitate open and transparent City government operations.
10. Generate a variety of reports relating to the status of legislative matters, Board member attendance and votes at various meetings, and pre-set and ad hoc queries.
11. Successful support of the City Charter required “Legislation Introduced” report be produced shortly after each Board of Supervisors meeting. This is separate from, and in addition to, adding these items to the meeting minutes.
12. A solution for legislation drafting and collaboration, including versioning and editing of legislative documents before introduction of the final version as a legislative item.
13. Workflow management capability for handling documents before and after introduction.
 - Before introduction, workflow management capability is needed for approvals to ensure coherence to submission standards, and all necessary attachments and follow up items are submitted.
 - After introduction, workflow management capability is needed to track deadlines and follow up on items and/or actions. For example, a report due in a year could have notifications automatically sent out to the author and the recipient.
 - Integrating e-signature capability where practical.
 - Extending the ability to make legislative data available in the spirit of open government.
14. Ensure the ability to integrate the entire legislative history into a document repository. This project should interface with and allow the public to search through all documents, both historical and current.
15. Provide a contract that includes a perpetual license to use the product, and any updates included.
16. Provide a document repository, which may be delivered as part of this solution or as a part of an integration with a third-party product, either as part of this or a future project.

1.6 Roles of City Departments in this RFP

The selected Proposer will work closely with the City Program Team, composed of staff primarily from the Office of the Clerk of the Board, Board of Supervisors, and also the Office of the Controller and Department of Technology. San Francisco Government Television (SFGovTV), a division of the City and County of San Francisco’s Department of Technology, handles live and recorded broadcast and streaming services for the City, including the archiving of all Board of Supervisors and Committee meetings. Other key stakeholders include:

1. City and County of San Francisco Departments that introduce legislation
2. Office of the Mayor
3. Office of the City Attorney
4. Office of the Budget and Legislative Analyst
5. Members of the public for use of the website and public participation

2. Scope of Work

This scope of work is a general guide to the work the City expects to be performed, and is not a complete listing of all services that may be required or desired.

To minimize duplication of effort and to allow the City to coordinate data requests and data available for the services requested within this RFP, as well as for previous and future projects, the selected Contractor's findings and data may be shared by the City with other City Contractors, as deemed appropriate by the City.

2.1 Contractor's General Obligations.

The following are work tasks assumed necessary to procure, install, and implement a LMS. Proposers may suggest a modified scope as part of their proposal. The Contractor shall furnish the following items and services as well as any additional items and services described in this document, and is required to perform the described functions:

1. Propose project schedule with significant milestones.
2. Meet with key department staff to develop detailed system specifications.
3. Identify minimum and desirable hardware requirements for department workstations and server(s).
4. Identify all needed hardware and software components required to implement the Legislative system solution.
5. Test all functional capabilities of LMS.
6. Install and configure LMS in department's environment.
7. Train department's Acceptance Testing Group in use and administration of LMS.
8. Initialize LMS to include all data converted from current legislative system.
9. Assess computer literacy levels of various LMS trainee groups.
10. Train local system administrators, and departmental and selected interdepartmental users, tailoring delivery of training to trainees' computer literacy levels.
11. Complete user and administrator documentation.
12. Meet with department project staff to provide progress reports and resolve issues.
13. Maintain and support the LMS during and after implementation.
14. Ensure ability to update and/or migrate system.
15. Propose proof of concept for user-acceptance testing. Proof of concept shall reflect customizations and workflow to be provided by COB.

2.2 BOS General Obligations

The City and County of San Francisco (CCSF) BOS will work with the Contractor to:

1. Provide workstations and servers meeting the minimum specifications provided by the Contractor.
2. Provide access to key departmental staff as needed.
3. Provide a department project manager and subject matter experts.
4. Review and approve the project plan.
5. Review and approve the Contractor's detailed system specifications submission

6. Review and approve the system's generated displays and reports.
7. Form departmental Acceptance Testing Group.
8. Participate in and approve design of user acceptance plan.
9. Review and approve the training plan.
10. Review and approve the system documentation.

2.3 Project Management

Project management shall be a key responsibility of the Contractor and a continuous function. The Contractor's project manager assigned to the BOS' LMS project shall have the authority to make commitments and decisions that are binding on the Contractor. All communications between the COB and the Contractor shall be coordinated through their respective project managers.

2.4 Implementation

The Contractor must determine the BOS/COB's preferred terms and abbreviations for screens and reports, common modes of operation and preferred procedures. The selected software must be installed in parallel with the current system without interfering in any way with daily operations. Since all current workstations are in use on a daily basis, an upgrade/changeover plan must be developed to minimize downtime on existing workstations.

2.5 Acceptance Testing

On-site acceptance testing will include appropriate Contractor and department staff, and will occur at a time agreeable to both the Contractor and the department. System acceptance tests will test all system components according to the test plan section of the work plan and will be designed to simulate the department's actual work environment. Toward this end, BOS historical data should be available – thus acceptance testing cannot begin until initial conversion and system configuration tasks are complete.

As a result of the BOS' deadlines for creating and publishing meeting agendas, minutes and other information, it is highly likely that most testing will, out of necessity, occur on weekends. Tests conducted on the BOS environment shall not prevent the operation of existing systems or cause system interruptions unless previously approved by the department.

2.6 Test Records

The Contractor will maintain records of all acceptance testing results. The records shall be keyed to the steps listed in the test procedures. The following items will be included in the test records:

1. Reference to the appropriate section of the test procedures.
2. Test results for each test segment, including a passed/failed indication and any modifications made to the procedures during the test.
3. Identification of the Contractor's test engineer and of the department's staff conducting the test.
4. Date of the test.
5. Provision for comments by the BOS/COB tester.
6. Copies of any variance reports generated.
7. System logs or printouts saved as part of the test.

2.7 Variance Reports

A variance report shall be prepared by either the COB's project manager or the Contractor's staff each time a deviation from specification requirements is detected. The report shall include a complete description of the variance, including date and time, and how it was found.

Each variance shall be assigned to one of the following three classes, depending on its severity and impact on the testing. Variances will be classified by the COB's Project Team.

Class 1: Severe variance that prevents, invalidates, or significantly impairs further testing. Testing will stop for immediate evaluation and correction.

Class 2: Significant variance. Testing will continue. Variance will be corrected as soon as possible.

Class 3: Minor, isolated variance that does not impact or invalidate other testing. Testing will continue. Variance will be corrected and tested at a mutually agreed upon time.

2.7.1 Disposition of Variances

The Contractor shall document actions taken to correct variances. Sufficient information shall be furnished by the department's project manager to determine the need for retesting the function, for testing interaction with any previously tested function, and for updating appropriate documentation as a result of the corrective action. The department must approve variance corrections that would result in a change to an approved document prior to their implementation. The variance report shall be completed when the Contractor and department project managers both acknowledge, by signatures, that the variance has been corrected or otherwise resolved.

2.7.2 Final Acceptance

The COB shall give final acceptance of software, customization, configuration, data transfer, training and other services following the Contractor's completion of all such work in accordance with the contract and after thirty (30) calendar days of continuous successful and error-free operation of the system in BOS' actual work environment.

If any portion of the system or services are deemed unacceptable, BOS shall notify the Contractor within ten (10) calendar days following such operation period. The Contractor will repair or replace unacceptable hardware or software, customizations or services within a mutually agreed upon time period at no additional charge to the department. Another thirty (30) calendar days successful operation period will follow any corrections or replacements.

The COB will issue a Letter of Acceptance after this period is complete and all variances are resolved.

The established acceptance date will mark the beginning of the Contractor's initial one-year warranty and technical support period and approval for the BOS to make the appropriate milestone payment.

2.8 Training

All training required for successful implementation and operation of the new system must be provided as a part of the package price. Classes shall be held at City Hall in a room with accommodations for the trainer and trainees.

The department envisions the following training classes. The Contractor should suggest other approaches to the training if it believes the approaches will improve the training.

Trainee Level	Functions	Approximate Trainees
Project Team & Stakeholders	Acceptance Testing Variance Report	7
System Administrators	Assign security to all users Make additions/changes/deletions Interpret and respond to all system messages Monitor system usage, audit tracking Install application software for new users Install software patches and system updates Use software configuration management tools Perform sophisticated data queries Maintain system integrity	4
Legislative Staff	Create/Modify Legislative actions Agenda/Minutes preparation System search functions Query/Reporting Document management	8
Legislative Aides	System search functions Query/Reporting	33
Operations Staff	System search functions Query/Reporting Document management	5

3. System Requirements Overview

3.1 Functional and Technical Expectations

Refer to Attachment VI: Functional & Technical Expectations for a list of LMS functional and technical expectations.

Proposers are also encouraged to review and refer to materials contained in Attachments VII through XI, to gain an understanding of the Office of the Clerk of the Board’s business and legislative processes, formatting, rules, and requirements.

3.2 Documentation

Complete documentation of the software for system use and system administration shall be provided. Documentation for system use shall explain how to use the system to perform business functions, in addition to explaining the screens and components. Documentation shall be prepared to at least meet the Contractor’s documentation standard apparent in their technical proposal. BOS may reject documents not adhering to that standard.

The Contractor shall provide a list of all documents to be provided with the system. The list shall describe each document and the document’s purpose, to help the user locate the appropriate document as needed.

3.2.1 User Documentation

All primary users must be provided with printed or .pdf and on-screen electronic system documentation, both a users' guide (in tutorial format) and a reference guide. All future system updates and changes must be accounted for in revised pages of manuals or complete updated manuals, as appropriate. This must occur simultaneously with a distribution of a software patch, system update or version release.

3.2.2 Administrator Documentation

All primary users must be provided with printed or .pdf and/or on-screen electronic system documentation, in a reference guide and quick start format. All future system updates and changes must be accounted for in revised pages of manuals or complete updated manuals, as appropriate. This must occur simultaneously with a distribution of a software patch, system update or version release.

3.2.3 Support

All vendors must also be able to provide technical support during CCSF working hours, Monday through Friday from 7:00 a.m. to 6:00 p.m. Pacific Standard Time, have an after-hours call center number, and a Service Level Agreement specifying appropriate response times that CCSF can agree to for different levels of problems including penalties if target times are missed.

3.3 Program Source Code

The BOS recognizes the potential proprietary nature of a Contractor's system and potential concerns over providing source code to customers. The department, however, must be assured that its investment in the system will be protected in the event that the Contractor becomes unwilling or is unable to support it.

For all delivered components, the software manufacturer shall provide the BOS with a machine-readable copy of all source code, build and support files under their control. This includes code and Help source files, batch and project files, libraries and other compile/link components. The Contractor shall provide updated source files as program updates are released during the initial and subsequent warranty and technical support periods. Any non-disclosure agreement would be subject to federal, state, and local laws requiring disclosure of public documents.

The CCSF expects intellectual property ownership of any customization designed specifically for BOS under the contract, and for a perpetually free license to be provided.

3.4 Processes and Requirements

The purpose of the replacement is to move to a more technologically advanced platform and program, while retaining all existing functionality and providing additional applications. The new system must be sufficiently flexible in functional and technical design to accommodate future technological changes and any re-engineering of the business environment.

4. City-Proposer Communications

Proposers are specifically directed **NOT** to contact any employees or officials of the City other than those specifically designated in this RFP and its Attachments. Unauthorized contact may be cause for rejection of proposals at the City's sole and absolute discretion.

5. RFP Questions and Answers

Please e-mail any questions to Wilson L. Ng at Wilson.L.Ng@sfgov.org. No oral questions will be accepted. Questions, in accordance with the schedule, must be in writing and received before 5:00 pm PST on May 5, 2017. No questions will be accepted after this time with the exception of City vendor compliance.

5.1 Summary of Information Requested and Presented

A summary of all questions and answers pertaining to this RFP will be posted on the City's website www.sfgov.org under Business – Bids & RFP's >>Consultants and Professional Services at the following URL: <http://mission.sfgov.org/OCABidPublication/ReviewBids.aspx> (“Website”). It is the Proposers' responsibility to check this Website for any updates. The City recommends that Proposers check the Website for updates on a daily basis at a minimum.

5.2 City Communication Following Receipt of Proposals

The City may contact the Proposers for clarification or correction of minor errors or deficiencies in their Proposals prior to deeming a Proposal as non-responsive. Clarifications are “limited exchanges” between the City and a Proposer for the purpose of clarifying certain aspects of the Proposal, and do not give a Proposer the opportunity to revise or modify its Proposal. Minor errors or deficiencies are defined as those that do not materially impact the City's evaluation of the Proposal; for example, failing to label the “original” Proposal as an “original”. For information regarding the City's Evaluation Process, See RFP Section 5.0 - Evaluation Criteria.

6. Submission Requirements

6.1 Time and Place for Submission of Proposals

Proposals and all related materials must be received by June 9, 2017 at 5:00 pm. Proposals may be delivered to:

San Francisco Board of Supervisors
Office of the Clerk of the Board
1 Dr. Carlton B. Goodlett Place, Room 244
San Francisco, CA 94102-4689
Attn: Wilson L. Ng – RFP #BOS2017-01

Postmarks will not be considered in judging the timeliness of submissions. Proposals submitted by e-mail or fax will not be accepted. Late submissions will not be considered, including those submitted late due to postal or delivery service failure. Note that Proposers hand-delivering proposals to City Hall may be required to open and make packages accessible for examination by security staff.

6.2 Proposal Package

The following items must be included in your proposal and packaged in a box or envelope, clearly marked “Legislative Management System (RFP #BOS2017-01).”

Proposals should provide a straightforward description of the Proposer's capabilities to satisfy the requirements of the RFP. Marketing and sales type information should be excluded. All parts, pages, figures, and tables should be numbered and clearly labeled.

- A. Vendor shall submit six (6) copies of their proposal in a binder or bound packet that is clearly marked, “Legislative Management System (RFP #BOS2017-01)” with tabulated sections. Proposals should contain the following:
- Introduction & Executive Summary
 - Table of Contents
 - References
 - Acknowledgement of RFP Terms and Conditions (Attachment I)
 - Contract Monitoring Division’s Local Business Enterprise Forms (Attachment II)
 - City’s Administrative Requirements (Attachment III)
 - City’s Agreement Terms and Conditions (Attachment IV)
 - Project and Fee Proposal (Attachment V)
 - Functional and Technical Expectations Worksheet (Attachment VI)
 - Financial Statements (Minimum of two full calendar or fiscal years)
- B. One (1) CD-ROM or flash drive containing entire digital contents of proposal, including all RFP Attachments. CD-ROM/flash drive and all files must be labeled with the Proposer’s name and clearly marked, “Legislative Management System (RFP #BOS2017-01).” All files should be submitted in unprotected PDF or Word format. Electronic files should include signatures, where applicable.

6.3 Format and Content of Proposals

6.3.1 Introduction and Executive Summary

Submit a letter of introduction and executive summary of the proposal package, signed by a person authorized by your firm to obligate your firm to perform the commitments contained in the proposal. Submission will constitute a representation by your firm that your firm is willing and able to perform the commitments contained in the proposal.

The letter of introduction should include the following: (1) contact information for all communications pertaining to the proposal (including telephone number, email address and mailing address); (2) a statement of the Proposer’s overall ability and qualifications to conduct the work; and, (3) a statement that the Proposer agrees to fully comply with all applicable San Francisco laws.

The executive summary should include the following: (1) a brief overview of the proposal’s principal elements; (2) demonstrate an understanding of the department’s LMS requirements; and (3) describe approaches the Proposer may employ to meet the needs of the City.

6.3.2 References

Provide references for at least five (5) most recently completed engagements where your firm provided Legislative Management solutions (preferably to other public agencies). References are subject to verification and must include the following information:

- Customer company name
- Description and scope of the project
- Description and scope of Proposer’s deliverables

- Description and scope of Subcontractor’s deliverables, if applicable
- Duration of project
- Date completed
- Customer contact name
- Customer contact phone
- Customer contact email
- Customer company physical address

Reference checks, including, but not limited to, prior clients may be used to determine the applicability of Respondent experience to the services the City is requesting and the quality of services and staffing provided to prior clients, as well as adherence to schedules/budgets and Respondent’s problem-solving, project management and communication abilities, as well as performance on deliverables and outcomes, and effectiveness in meeting or exceeding project objectives. Contacts provided as part of the proposal’s prior project description (Attachment V) may also 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.

6.3.3 Acknowledgement of RFP Terms and Conditions

Refer to Attachment I: Acknowledgement of RFP Terms and Conditions. The successful proposer will be required to agree to comply fully with and be bound by the applicable provisions of state and local laws related to conflicts of interest, including Section 15.103 of the City's Charter, Article III, Chapter 2 of City’s Campaign and Governmental Conduct Code, and Section 87100 et seq. and Section 1090 et seq. of the Government Code of the State of California. The successful proposer will be required to acknowledge that it is familiar with these laws; certify that it does not know of any facts that constitute a violation of said provisions; and agree to immediately notify the City if it becomes aware of any such fact during the term of the Agreement.

Individuals who will perform work for the City on behalf of the successful proposer might be deemed consultants under state and local conflict of interest laws. If so, such individuals will be required to submit a Statement of Economic Interests, California Fair Political Practices Commission Form 700, to the City within ten (10) calendar days of the City notifying the successful proposer that the City has selected the proposer.

Each Respondent, as part of its Response, must submit the document contained in , signed by a representative(s) authorized by the Respondent to make representations for the Respondent and to obligate the Respondent to perform the commitments contained in its Response.

6.3.4 Local Business Enterprise Forms

There is no S.F. Administrative Code 14B Local Business Enterprise (LBE) subcontracting requirement for this RFP or resulting contract. However, the City strongly encourages responses from qualified LBEs. All Proposers must submit the forms required as part of RFP Attachment II: Local Business Enterprise Forms. LBEs will be eligible for rating discounts in accordance with RFP Attachment II: Local Business Enterprise Forms and are strongly encouraged to submit responses. Pursuant to Administrative Code, Chapter 14B, rating bonuses will be in effect for any Proposers who are certified as a Small- or Micro-LBE. Please see the RFQ Attachment II: Local Business Enterprise Forms for more information

6.3.5 City’s Administrative Requirements

Proposer must fulfill the City's administrative requirements for doing business with the City prior to contract award. Fulfillment is defined as completion, submission and approval by applicable City agencies of the forms and requirements referenced in RFQ Attachment III: City's Administrative Requirements.

6.3.6 City's Agreement – Terms and Conditions

Respondent must be willing and able to meet all of the City's applicable terms and conditions as stated in the City's standard Software Development Agreement ("Agreement") template (see RFQ Attachment IV). Respondents wishing to negotiate modification of other terms and conditions must attach a copy of the City's Agreement referring to the specific portion of the Agreement to be changed, and show proposed changes (deleted sections with a strikeover and added sections in boldface type). The City's selection of any Respondent who proposes changes to the City's Agreement terms shall not be deemed as acceptance of the Respondent's proposed changes.

6.3.7 Project and Cost Proposal

Refer to Attachment V: Proposal Template for a copy of the Proposal Template. The CCSF intends to award this contract to the firm that it considers will provide the best overall program services. The CCSF reserves the right to accept other than the lowest priced offer and to reject any proposals that are not responsive to this request. Please reference Attachment V: Proposal Template for additional cost proposal formatting requirements.

Please provide a fee proposal that includes the following:

- A. Total fee for each of the disciplines identified in the scope of work with a not-to-exceed figure.
- B. Hourly rates for all team members. Hourly rates and itemized costs may be used to negotiate changes in the scope of work if necessary.

6.3.8 Functional and Technical Expectations

Refer to Attachment VI: Functional & Technical Expectations for a list of LMS functional and technical expectations. For each of the functional and technical areas, Proposers should specify whether or not their proposed solution can meet each item. If an expectation(s) cannot be fully met by the 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. Proposers should specify if work will require a subcontractor or third party in order to fully meet expectations.

6.3.9 Financial Statements

The financial solvency of the vendors is critical to the protection of the CCSF. Vendors must provide audited financial statements for the past two calendar years or fiscal years with a certified opinion from a certified public accountant or accountancy firm. If audited financial statements are not available, unaudited financial statements will be accepted, but should be accompanied by a credit report from one of the following institutions: Dunn and Bradstreet, Moody's or Standard and Poor's.

7. Evaluation & Selection Criteria

This section describes the guidelines used for analyzing and evaluating the proposals. It is the City’s intent to select Proposer(s) for contract negotiations that will provide the best overall service package to the City inclusive of fee considerations. Proposers selected for contract negotiations are not guaranteed a contract. This RFP does not in any way limit the City’s right to solicit contracts for similar or identical services if, in the City’s sole and absolute discretion, it determines the proposals submitted in response to this RFP are inadequate to satisfy its needs.

The proposals will be evaluated during the Evaluation Phase by a selection committee comprised of parties with expertise in the San Francisco Board of Supervisors’ legislative process and systems.

The top three (3) firms with the highest scoring proposals will proceed to the Selection Phase for interview by the selection committee and invited to present a product demonstration. Final score and selection will be based on the cumulative score achieved during both the Evaluation Phase and Selection Phase, for a maximum total score of 2000 points. The City reserves the right to re-score written proposals based on findings or information presented at the interview or product demonstration.

The City intends to evaluate the proposals in accordance with the criteria itemized below.

Evaluation Phase (1000 points)	Scoring
Initial Screening	Pass/Fail
Written Proposal Package	700 points
Price Proposal	300 points

Selection Phase* (1000 points)	Scoring
Interview	300 points
Product Demonstration	700 Points

* Top three (3) proposals from the Evaluation Phase.

7.1 Initial Screening (Minimum Qualifications)

City will review each Proposal for initial determinations on responsiveness and acceptability. Elements reviewed during the Initial Screening include, without limitation: proposal completeness, compliance with format requirements, compliance with minimum qualification requirements, and verifiable references.

Proposals are not scored during the Initial Screening process. Initial Screening is simply a pass/fail determination as to whether a Proposal meets the threshold requirements described above. A Proposal that fails to meet the minimum requirements **will not** be eligible for further consideration. The City reserves the right to request clarification from Proposers prior to rejecting a Proposal for failure to meet the Initial Screening requirements. Clarifications are “limited exchanges” between the City and a Proposer for the purpose of clarifying certain aspects of the Proposal, and will not give a Proposer the opportunity to revise or modify its Proposal. Proposals that meet the Initial Screening requirements shall proceed to the Evaluation Process.

The following section defines minimum qualifications for vendors who wish to be considered for award of the LMS contract. Proposers that do not demonstrate that the vendor(s) meets these minimum qualifications, at the

time the proposal is submitted, will be considered non-responsive and will not be eligible for contract award. Any business that wishes to respond to this RFP should review this section carefully to determine whether it meets these minimum qualifications before undertaking the preparation of a proposal.

Vendors may demonstrate their qualifications to perform the contract that will result from this RFP by teaming with subcontractors. A vendor submitting a proposal that does not include subcontractors must demonstrate its ability to meet these minimum requirements. If the vendor intends to use subcontractors, then both the vendor and each of its subcontractors must demonstrate their ability to comply with the minimum requirements.

Minimum Qualification Requirement	Pertinent item(s) to be submitted with Proposal
Complete all prerequisite requirements and submitted forms described in RFP Attachment I, II, III, IV, V, and VI as part of Proposal, as applicable.	Attachment I: Acknowledgement of RFP Terms and Conditions Attachment II: Local Business Enterprise Forms Attachment III: City’s Administrative Requirements Attachment IV: City’s Agreement Terms & Conditions Attachment V: Proposal Template Attachment VI: Functional & Technical Expectations
Minimum of one (1) Prior Project Description(s) and Project Plan(s), clearly demonstrating successful completion of a Legislative Management System implementation within the last three (3) years.	Attachment V: Proposal Template > Prior Project Description(s) and Project Plan(s)
Provide 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.	Solvency letter from a certified public accountant or accountancy firm

Note that proposals received under this RFP that fail to address each of the requested items in sufficient and complete detail to substantiate that the Proposer can meet the City’s Minimum Qualifications will not be considered.

7.1.1 General/Miscellaneous (Minimum Qualifications)

All vendors must be in compliance with various City requirements, and with various ethical and public policy stipulations. Vendors must also commit to notifying the CCSF and to obtain the CCSF’s advance approval of any substitution of vendors or subcontractors when significant staffing changes occur in vendors or subcontractors to the CCSF project team, and be willing to coordinate with the vendor of the existing system to convert the existing data to the new system. For further information, please review the Office of Contract Administration’s Qualify to Do Business webpage at www.sfgov.org/oca/qualify-do-business.

Vendors must be able to facilitate an opportunity for CCSF staff representatives to observe or work in an existing installation for a trial period before the purchase decision is made.

7.2 Written Proposal Evaluation Criteria (700 points)

Proposal packages will be evaluated in accordance to the RFP Submission Requirements, based on the criteria below.

7.2.1 Proposer and Partner (if applicable) Firm Qualifications (100 points)

- a) Experience with Legislative Management and projects of comparable size and scope;
- b) Expertise of the firm and sub-consultants, if necessary, to complete the project;
- c) Quality of recently completed projects (i.e., adherence to schedules, deadlines, budgets); and
- d) Capacity and resources to provide services under this RFP (i.e., staff size, composition, breadth of services).

7.2.2 Proposed Staff Qualifications (100 points)

- a) Clarity and appropriateness of proposed staffing structure, including proposed staff organization chart;
- b) Clarity and appropriateness of proposed staff roles and responsibilities;
- c) Professional qualifications and education of staff, including partners and sub-consultants; and
- d) Workload, availability and accessibility of staff. Reliability of staff through completion of services.

7.2.3 Project Approach (200 points)

- a) Ability to meet project requirements, expectations, and provide a comprehensive solution;
- b) Understanding of the project and the tasks to be performed;
- c) Reasonableness of work schedule and timeline of deliverables; and
- d) Expertise and methodology to create competitive differences that will be beneficial to the City.

7.2.4 Functional and Technical Expectations (200 points)

- a) Ability to simply and comprehensively address functional and technical expectations; and
- b) Ability to deliver customizations, if any, within reasonable scope and schedule.

7.2.5 Response to Requirements (100 points)

- a) Overall completeness of RFP package and materials as described in the Submission Requirements; and
- b) Clarity and comprehensiveness of the solution presented and simplicity of any integration points.

7.3 Price Proposal Criteria (300 points)

The City intends to award a contract to the firm it considers will provide the best overall value of program services. The City reserves the right to accept other than the lowest priced offer and to reject any proposals that are not responsive to this request. Price submissions must be in a separate envelope, and will be evaluated by BOS staff. Proposers must submit a detailed price proposal to establish the contract pricing and to award a price score to each proposal. Proposers are encouraged to refer to Attachment VI: Functional & Technical Expectations, for a list of functional and technical expectations to evaluate and include customization costs, third party integration costs, and subcontract if necessary to provide a comprehensive solution quote.

Price scoring will be based on the total price submitted as part of the proposal package; however, hourly rates and itemized costs must be included to negotiate changes in the scope of work if necessary. Please refer to the Submission Requirements > Project and Cost Proposal for more details, and Attachment V: Proposal Template for formatting and submission requirements.

7.4 Selection Criteria (1000 points)

7.4.1 Selection Interviews (300 points)

Following the City’s evaluation of written proposals, the top three (3) Proposers will be invited to interviews. Interviews will consist of standard questions asked of all selected Proposers, and specific questions regarding individual proposals. The lead staff members that will be assigned to the project should be present for the interview, as well as the lead staff of any subcontractor. The interview will consist of standard questions asked of each of the vendors, and specific questions regarding each individual proposal.

7.4.2 Product Demonstration (700 points)

The top Proposers invited to interviews will also be required to provide a working product demonstration of their proposed Legislative Management System to verify system functionality. Proposers should provide a working prototype that is reflective of the Office of the Clerk of the Board’s functional and technical expectations, workflow, and practices.

In preparation for the product demonstration, Proposers are encouraged to review and refer to materials contained in Attachments VI through XI, to gain an understanding of the Office of the Clerk of the Board’s functional and technical expectations, business and legislative processes, formatting, rules, and requirements.

As it is the City’s goal to install a reliable and stable LMS that can handle the tasks of the existing system, and allow complete and seamless conversion, Proposers are also strongly encouraged to visit the Office of the Clerk of the Board’s Legislative Research Center, the public-facing portal of the current LMS, at www.sfbos.org/legislative-research-center-lrc to gain an understanding of existing functionalities, data fields, legislative and meeting documentation and processes, output examples, and reports.

Product demonstrations may be evaluated by the selection committee based on top Proposer’s understanding of processes and ability to deliver functional and technical expectations. The lead staff members that will be assigned to the project should be present for the demonstration, as well as the lead staff of any subcontractor. The City, at its sole discretion, may elect to conduct further testing and evaluation of the proposed solution in order to ascertain a proposed solution that best fits the City’s needs. All costs related to product demonstration testing will be the responsibility of the Proposer.

7.4.3 Release and Waiver Agreement

To effectuate the candid completion of the reference check, Proposer is required to execute and submit the Release and Waiver Agreement contained in Attachment I: Acknowledgement of RFP Terms and Conditions that includes Release of Liability. Relatives of the Proposer cannot be listed as References.

7.4.4 Other Terms and Conditions

The selection of any Proposer for contract negotiations shall not imply acceptance by the City of all terms of the proposal, which may be subject to further negotiation and approvals before the City may be legally bound thereby.

The City will select the highest scoring and most responsive Proposer with whom City staff will commence contract negotiations. If a satisfactory contract cannot be negotiated in a reasonable time with the selected Proposer, then the City, in its sole discretion, may terminate negotiations and begin contract negotiations with the next highest scoring Proposer it deems qualified. The City, in its sole discretion, has the right to approve or disapprove any staff person assigned to its projects, and any staff substitutions, before and throughout the contract term. The City reserves the right at any time to approve, disapprove, or modify proposed project plans, timelines and deliverables, provided that all modifications are within the scope of services sought by this RFP.

8. Protest Procedures

Failure of a Proposer to comply with the protest procedures set forth in this section will render a protest inadequate and non-responsive, and will result in rejection of the protest.

8.1 Protest of Non-Responsiveness Determination

By 5:00 p.m. PST on the fifth (5th) working day of the City's issuance of a notice of non-responsiveness, any Proposer that has submitted a proposal and who believes that the City has incorrectly determined that its proposal is non-responsive, may submit a written notice of protest by e-mail or certified mail (fax is not acceptable). Such notice of protest must be received by the City on or before 5 p.m. PST of the fifth (5th) working day following the City's issuance of the notice of non-responsiveness. The notice of protest must include a written statement specifying in detail each and every reason asserted for the protest. The protest must be signed by an individual authorized to represent the Proposer, and must cite the law, rule, local ordinance, procedure or RFP provision on which the protest is based. In addition, the protestor must specify facts and evidence sufficient for the City to determine the validity of the protest.

8.2 Protest of Contract Award

By 5:00 p.m. PST on the fifth (5th) working day of the City's issuance of a notice of intent to award a contract under this RFP, any Proposer that has submitted a responsive proposal and who believes that the City has incorrectly selected another Proposer for award may submit a written notice of protest by e-mail (fax is not acceptable). Such notice of protest must be received by the City on or before 5 p.m. PST of the fifth (5th) working day after the City's issuance of the notice of intent to award a contract.

The notice of protest must include a written statement specifying in detail each and every reason asserted for the protest. The protest must be signed by an individual authorized to represent the Proposer, and must cite the law, rule, local ordinance, procedure or RFP provision on which the protest is based. In addition, the protestor must specify facts and evidence sufficient for the City to determine the validity of the protest.

8.3 Delivery of Protests

All protests must be received by the specified date and time deadline. If a protest is mailed, the protestor bears the risk of non-delivery within the deadlines specified herein. Protests should be transmitted by a means that objectively will establish the date the City received the protest. Protests or notice of protests made orally (e.g., by telephone) or by fax will not be considered.

Protests must be delivered to:

E-mail:

Wilson.L.Ng@sfgov.org

Mail:

Wilson L. Ng

Office of the Clerk of the Board

City Hall, Room 244

1 Dr. Carlton B. Goodlett Place

San Francisco, CA 94102

8.4 **Protest Review**

The COB will confirm receipt of notice of protest by Proposer. If a Proposer submits a complete and timely protest, the COB will review notice of protest soon after receipt of the protest to determine validity of notice, including, but not limited to: (a) receipt by due date; (b) inclusion of a written statement specifying in detail each and every one of the grounds asserted for the protest; (c) signed by an individual authorized to represent the Proposer; (d) citation of the law, rule, local ordinance, procedure or RFP provision on which the protest is based; and (e) specification of facts and evidence sufficient for the City to determine the validity of the protest. The City, at its discretion, may make a determination regarding a protest without requesting further documents or information from the Proposer who submitted the protest. Accordingly, the initial protest must include all grounds of protest and all supporting documentation or evidence reasonably available to the prospective Proposer at the time the protest is submitted. If the Proposer later raises new grounds or evidence that were not included in the initial protest, but which could have been raised at that time, then the City may not consider such new grounds or new evidence. The review shall be an informal process conducted by the COB or its designee and will be based upon the information submitted by the Respondent in its protest letter. The COB will notify the Respondent in writing of its decision at the conclusion of the review. The decision of the COB is final. The evaluation of proposals will not be delayed or postponed to allow for completion of a protest process.

Protests not received within the time and manner specified will not be considered. A Proposer's failure to protest as specified above on or before the time specified above shall constitute a complete and irrevocable waiver of the ground(s) of protest and forfeit the Proposer's right to raise such ground(s) of protest later in the procurement process, in a Government Code Claim, or in other legal proceedings.

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