

Solicitation 2009-87-C

CSP for Paperless Agenda Solution



City of Plano

Bid 2009-87-C

CSP for Paperless Agenda Solution

Bid Number 2009-87-C
Bid Title CSP for Paperless Agenda Solution

Bid Start Date Mar 10, 2009 11:07:28 AM CDT
Bid End Date Apr 8, 2009 3:00:00 PM CDT
Question & Answer End Date Apr 30, 2009 3:00:00 PM CDT

Bid Contact Aimee Storm
Buyer
Purchasing
972-941-7248
Aimees@plano.gov

Contract Duration 1 year
Contract Renewal 3 annual renewals
Prices Good for Not Applicable
Pre-Bid Conference Mar 30, 2009 1:00:00 PM CDT (Online)
Attendance is optional

Item Response Form

Item 2009-87-C-1-01 - Do not enter any line items online.
Quantity 1 each
Unit Price
Delivery Location City of Plano
No Location Specified
Qty 1

Description
All proposals will be submitted via hard copy only.

COMPETITIVE SEALED PROPOSAL NO.: 2009-87-C**CSP for Paperless Agenda Solution**

DOCUMENTS ARE DUE TO THE PURCHASING DIVISION **PRIOR** TO:

3:00 PM (CST) on WEDNESDAY, APRIL 8, 2009

NO LATE BIDS WILL BE ACCEPTED

*****VENDOR MUST SUBMIT ONE (1) ORIGINAL WITH ALL SUPPORTING PROPOSAL DOCUMENTS AND SIX (6) COPIES ARE REQUIRED TO FACILITATE EVALUATION. IF "COPY(IES)" ARE NOT SUBMITTED WITH THE ORIGINAL, YOUR CSP MAY BE CONSIDERED AS "NON-RESPONSIVE TO SPECIFICATIONS" AND MAY NOT BE CONSIDERED FOR FURTHER EVALUATION.**

Time Critical Competitive Sealed Proposal Deliveries: The City of Plano, Texas can not guarantee, due to internal procedures, that any documents sent Priority Mail will be picked up and delivered by the closing date and time. It is recommended that critical document deliveries be made either in person or via an alternate delivery method.

NOTE TO PERSPECTIVE BIDDERS REGARDING REGISTRATION ON WWW.BIDSYNC.COM: THE CITY OF PLANO UTILIZES THE E-PROCUREMENT SYSTEM BIDSYNC (www.bidsync.com) TO RECEIVE AND DISTRIBUTE REQUESTS FOR PROPOSALS AND BIDS. THERE IS **NO CHARGE** TO THE VENDOR FOR USING THIS E-PROCUREMENT SYSTEM. TO REGISTER AS A VENDOR GOTO www.bidsynct.com THE USE OF THIS SYSTEM IS TOTALLY **FREE** FOR VENDOR BIDDING ON CITY OF PLANO POSTED BIDS/RFP/RFQ/BEST VALUE BIDS, ETC.

FOR ADDITIONAL INFORMATION CONCERNING THIS **CSP** PLEASE CONTACT:

Aimee Storm
Buyer
aimees@plano.gov

*******GENERAL INFORMATION*********CITY OF PLANO, TEXAS****COMPETITIVE SEALED PROPOSAL NO.: 2009-87-C****CSP for Paperless Agenda Solution****QUESTIONS CONCERNING CSP**

To ensure that all prospective respondents have accurately and completely understood the requirements, the City of Plano – Purchasing Division will accept questions up until **3:00 (CDT) on Monday, March 30, 2009**. Questions will only be answered during the online pre-proposal conference.

“NO QUESTIONS WILL BE ANSWERED VIA TELEPHONE.”

DELIVERY OF CSP

Mark **CSP** package(s): **“CSP No. 2009-87-C – CSP for Paperless Agenda Solution”**. All CSP’s **must** be delivered or mailed to the following location **prior** to **3:00 pm (CDT)** on **Wednesday, April 8, 2009**.

DELIVER TO:

City of Plano – Purchasing Division
1520 Avenue K, Suite 370
Plano, TX 75074

PUBLIC OPENING

CSP’s will be publicly opened in the Purchasing Division, Municipal Center, 1520 Avenue K, Suite 370, Plano, TX 75074 on **Wednesday, April 8, 2009** at **3:00 pm (CDT)**. Only the names of the firms submitting **CSP’s** will be read aloud at the public opening.

SMWBE POLICY

IT IS THE POLICY OF THE CITY OF PLANO TO INVOLVE SMALL BUSINESSES AND MINORITY/WOMAN OWNED BUSINESSES TO THE GREATEST EXTENT POSSIBLE IN THE PROCUREMENT OF GOODS, EQUIPMENT, SERVICES AND CONSTRUCTION PROJECTS. TO ASSIST US WITH OUR RECORDKEEPING, VENDORS SHOULD IDENTIFY ANY SMALL/MINORITY/WOMAN-OWNED COMPANY BEING UTILIZED IN THIS BID AND NOTE THE MONETARY INVOLVEMENT.

WRITE THE **CSP** NUMBER ON YOUR ENVELOPE IN THE LOWER LEFT CORNER.

SEE ATTACHED **COMPETITIVE SEALED PROPOSAL** PACKET.

QUOTE F.O.B. DESTINATION: City of Plano – 1117 East 15th Street, Plano, TX 75074

ANNUAL CONTRACT VERBIAGE

This agreement will contain a fixed pricing structure for the term of the agreement. Quantities shown are estimates and NOT a commitment to buy any specific quantity. Orders will be placed on a non-exclusive, "as needed", basis. Orders placed by the City of Plano will be done so utilizing Contract Release Orders (CRO's). All invoices must reference City of Plano CRO number.

WRITTEN CONTRACT VERBIAGE

The successful vendor must execute a **CONTRACT** within ten (10) days after receipt of documents. Proposer/Vendor agrees to submit to the City, a corporate resolution, certificate of partnership, partnership agreement or joint venture agreement which identifies the person(s) authorized to execute a contract on behalf of the corporation, partnership or joint venture.

INSURANCE VERBIAGE

Upon request, the successful vendor must **SUBMIT PROOF OF MEETING NECESSARY INSURANCE REQUIREMENTS** within ten (10) business days of notification by the City of Plano. Failure to respond within ten (10) business days will be grounds for declaring vendor non-responsive to specifications.

City of Plano Insurance Requirements

Requirements

Contractors performing work on City property or public right-of-way for the City of Plano shall provide the City a certificate of insurance evidencing the coverages and coverage provisions identified herein.

Contractors shall provide the City evidence that all subcontractors performing work on the project have the same types and amounts of coverages as required herein or that the subcontractors are included under the contractor's policy. The City, at its own discretion, may require a certified copy of the policy.

All insurance companies and coverages must be authorized by the Texas Department of Insurance to transact business in the State of Texas and must be acceptable to the City of Plano.

Listed below are the types and amounts of insurance required. The City reserves the right to amend or require additional types and amounts of coverages or provisions depending on the nature of the work.

Type of Insurance	Amount of Insurance	Provisions
1. Commercial General (Public) Liability to include coverage for: a) Premises/Operations b) Products/Completed Operations c) Independent Contractors d) Personal Injury e) Contractual Liability	\$500,000 each occurrence, \$1,000,000 general aggregate; Or \$1,000,000 combined single limits	City to be listed as additional insured and provided 30-day notice of cancellation or material change in coverage. City prefers that insurer be rated B+VI or higher by A.M. Best or A or higher by Standard & Poors
1. Business Auto Liability	As required by State of Texas	
Workers' Compensation & Employers' Liability	Statutory Limits \$100,000 each accident	City to be provided a waiver of subrogation

Questions regarding this insurance should be directed to the City of Plano Purchasing Department at (972) 941-7557

A PURCHASE ORDER WILL NOT BE ISSUED WITHOUT EVIDENCE OF INSURANCE.

INSURANCE REQUIREMENT AFFIDAVIT
(SUPPLEMENTAL INFORMATION)

(To be completed by appropriate Insurance Agent)

I, the undersigned agent, certify that the insurance requirements contained in this proposal document have been reviewed by me with the below identified vendor. If the below identified vendor is awarded this contract by the City of Plano, I will be able, within ten (10) working days after being notified of such potential award, to furnish a valid insurance certificate to the City meeting all of the requirements contained in this proposal.

Agent's Signature

Agent's Name Printed

Name of Insurance Carrier

Address of Agency

City, State, Zip

Phone number where Agent may be contacted

Vendor's Name (please print or type)

SUBSCRIBED AND SWORN to before me by the above named _____

on this the _____ day of _____, 20____.

Notary Public in and for the State of _____.

NOTE TO AGENT:

IF THIS TIME REQUIREMENT IS NOT MET, THE CITY HAS THE RIGHT TO DECLARE THIS VENDOR NON-RESPONSIVE AND AWARD THE CONTRACT TO THE NEXT LOWEST PROPOSER MEETING THE SPECIFICATIONS. IF YOU HAVE ANY QUESTIONS CONCERNING THESE REQUIREMENTS, PLEASE CONTACT THE CITY OF PLANO PURCHASING DIVISION AT 972-941-7557.

INSURANCE REQUIREMENT AFFIDAVIT

(To be completed by appropriate Insurance Agent)

I, the undersigned agent, certify that the insurance requirements contained in this proposal document have been reviewed by me with the below identified vendor. If the below identified vendor is awarded this contract by the City of Plano, I will be able, within ten (10) working days after being notified of such potential award, to furnish a valid insurance certificate to the City meeting all of the requirements contained in this proposal.

Agent's Signature_____
Agent's Name Printed_____
Name of Insurance Carrier_____
Address of Agency_____
City, State, Zip_____
Phone number where Agent may be contacted_____
Vendor's Name (please print or type)

SUBSCRIBED AND SWORN to before me by the above named _____

on this the _____ day of _____, 20____.

Notary Public in and for the State of _____.**NOTE TO AGENT:**

IF THIS TIME REQUIREMENT IS NOT MET, THE CITY HAS THE RIGHT TO DECLARE THIS VENDOR NONRESPONSIVE AND AWARD THE CONTRACT TO THE NEXT LOWEST PROPOSER MEETING THE SPECIFICATIONS. IF YOU HAVE ANY QUESTIONS CONCERNING THESE REQUIREMENTS, PLEASE CONTACT THE CITY OF PLANO

AFFIDAVIT OF NO PROHIBITED INTEREST

I, the undersigned declare and affirm that no person or officer of _____
 _____ (herein "Contractor") is either employed by the City of
 Plano or is an elected official of the City of Plano and who has a financial interest, direct
 or indirect, in any contract with the City of Plano or has a financial interest, directly or
 indirectly, in the sale to the City of Plano of any land, or rights or interest in any land,
 materials, supplies or service. As per Section 11.02 of the Plano City Charter, interest
 represented by ownership of stock by a City of Plano employee or official is permitted if
 the ownership amounts to less than one (1) per cent of the corporation stock.

I further understand and acknowledge that the existence of a prohibited interest at any
 time during the term of this contract will render the contract voidable.

 Name of Contractor

By: _____
 Signature

 Print Name

 Title

 Date

STATE OF _____ §

§

COUNTY OF _____ §

§

SUBSCRIBED AND SWORN TO before me this _____ day of
 _____, 200____.

 Notary



CONFLICT OF INTEREST QUESTIONNAIRE (CIQ)

Any vendor who completes the "Conflict of Interest Questionnaire (CIQ)" must separately

file the form with the City Secretary's Office at:

CITY OF PLANO

ATTN: CITY SECRETARY'S OFFICE

P.O. BOX 860358

PLANO, TX 75086-0358

CONFLICT OF INTEREST QUESTIONNAIRE		FORM CIQ
For vendor or other person doing business with local governmental entity		
This questionnaire is being filed in accordance with chapter 176 of the Local Government Code by a person doing business with the governmental entity. By law this questionnaire must be filed with the records administrator of the local government not later than the 7th business day after the date the person becomes aware of facts that require the statement to be filed. See Section 176.006, Local Government Code. A person commits an offense if the person violates Section 176.006, Local Government Code. An offense under this section is a Class C misdemeanor.		OFFICE USE ONLY Date Received
1	Name of person doing business with local governmental entity.	
2	☐ Check this box if you are filing an update to a previously filed questionnaire. (The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than September 1 of the year for which an activity described in Section 176.006(a), Local Government Code, is pending and not later than the 7th business day after the date the originally filed questionnaire becomes incomplete or inaccurate.)	
3	Describe each affiliation or business relationship with an employee or contractor of the local governmental entity who makes recommendations to a local government officer of the local governmental entity with respect to expenditure of money.	

FORM CIQ**Page 2****CONFLICT OF INTEREST QUESTIONNAIRE****For vendor or other person doing business with local governmental entity**

- 4** Describe each affiliation or business relationship with a person who is a local government officer and who appoints or employs a local government officer of the local governmental entity that is the subject of this questionnaire.

Amended 01/13/2006

- 5** **Name of local government officer with whom filer has affiliation or business relationship. (Complete this section only if the answer to A, B, or C is YES.**

This section, item 5 including subparts A, B, C & D, must be completed for each officer with whom the filer has affiliation or other relationship. Attach additional pages to this Form CIQ as necessary.

A. Is the local government officer named in this section receiving or likely to receive taxable income from the filer of the

questionnaire? ☐ Yes ☐ No

B. Is the filer of the questionnaire receiving or likely to receive taxable income from or at the direction of the local government

officer named in this section AND the taxable income is not from the local governmental entity? ☐ Yes ☐ No

C. Is the filer of this questionnaire affiliated with a corporation or other business entity that the local government officer serves as an officer or director, or holds an ownership of 10 percent or more?

☐ Yes ☐ No

D. Describe each affiliation or business relationship.

- 6** **Describe and other affiliation or business relationship that might cause a conflict of interest.**

7

Signature of person doing business with the governmental entity

Date

Amended 01/13/2006

Local Government Officers
City of Plano, Texas

For purposes of completion of the required Conflict of Interest Questionnaire for the City of Plano Texas (required by all Vendors who submit bids/proposals), Local Government Officers are:

Mayor: Pat Evans

Councilmembers: Jean Callison, Mayor Pro Tem
Harry LaRosiliere, Deputy Mayor Pro Tem
Pat Miner
Scott Johnson
Mabrie Jackson
Sally Magnuson
Lee Dunlap

City Manager: Thomas H. Muehlenbeck

City of Plano

Environmentally Preferable Purchasing Questionnaire

The City of Plano adopted an Environmental Purchasing Policy in March, 2008 which is posted on the Purchasing Department's Website.

The goal of the policy is to encourage the purchase and use of materials, products and services that are economically responsible that include environmental factors in the decision making process

Product and service attributes include, but are not limited to, recycled content, energy and/or water conservation, toxic material waste minimization and disposal methods.

To help measure the success of this EPP the Purchasing Department has developed this questionnaire concerning environmentally preferable products and services.

Note: This will either be an optional or required submittal.

If the bid or proposal requires environmentally preferred products/services in the specification and will be evaluated as such then this questionnaire shall be submitted with all other documents pertaining to the bid/proposal.

If there are no requirements in the specifications for these products/services but would like to help us gather information on environmentally preferable products then complete this questionnaire and submit it as optional information with the bid/proposal documents.

City of Plano

Vendor Name:	Phone:
Product/Service:	

Does Product or Service?	Yes	No	Details
Contain recycled material			
Reduce energy consumption			
Certified by certification programs such as Energy Star, Green Seal, Ecologo, EPEAT, etc.			
Reduce toxicity, including emissions			
Reduce waste			
Contain Recyclable materials			
Reduce water consumption			
Have other environmental impacts			

(Attach supporting documents if needed)

VENDOR SUPPLEMENTAL INFORMATION

Please provide the following information for contract development:

Is the company a	1.	Sole Proprietorship	_____ Yes	_____ No
	2.	General Partnership	_____ Yes	_____ No
	3.	Limited Partnership	_____ Yes	_____ No
	4.	Corporation	_____ Yes	_____ No
	5.	Other _____	_____ Yes	_____ No

If the company is a **sole proprietorship**, please list the owner's full legal name, the name under which business is conducted (i.e. d/b/a), the address for the company, including the state and county in which your business is located:

If the company is a **general partnership**, please list the exact name of the partnership, whether it is a partnership formed under the laws of the State of Texas or another state, the business address for the partnership, including the state and county, and list of the names of all of the partners for the partnership:

If the company is a **limited partnership**, please list the exact name of the limited partnership, whether it is a limited partnership formed under the laws of the State of Texas or another state, the business address for the limited partnership, including the state and county, and list the names of all the general partners for the partnership:

In the case of a **limited partnership** (foreign or domestic), is it registered with the Secretary of State of the State of Texas and authorized to do business in this State? _____ Yes _____ No

In the case of a **limited partnership** (foreign or domestic), is its general partner(s) registered with the Secretary of State of the State of Texas and authorized to do business in this State? _____ Yes _____ No

If the company is a **corporation**, please list the exact name of the corporation, whether it is a corporation formed under the laws of the State of Texas or another state, the business address for the corporation, including the state and county, and list the names of all of the officers for the corporation:

In the case of a **corporation** (foreign or domestic), is it registered with the Secretary of State of the State of Texas and authorized to do business in this State? _____ Yes _____ No

If the company is a **limited liability company**, please list the exact name of the limited liability company, whether it is a limited liability company formed under the laws of the State of Texas or another state, the business address for the limited liability company, including the state and county, and list the names of all the members/managers for the limited liability company:

In the case of a **limited liability company** (foreign or domestic), is it registered with the Secretary of State of the State of Texas and authorized to do business in this State? _____ Yes _____ No

In the case of a **limited liability company** (foreign or domestic), is its member(s)/manager(s) (if not an individual) registered with the Secretary of State of the State of Texas and authorized to do business in this State? _____ Yes _____ No

If the company is **another entity** not listed above, please list the exact name and type of company, the state under which it is formed, the business address for the company, including the state and county, and list the names of all of the persons authorized to act on the company's behalf:

In the case of **another entity** (foreign or domestic), is it registered with the Secretary of State of the State of Texas and authorized to do business in this State? _____ Yes _____ No

Please provide a list of names and capacity of all individuals who are authorized to execute contracts or documents on behalf of your organization:

Is the company a minority, or woman-owned business enterprise?

_____ No _____ Yes If yes, specify: _____ MBE _____ WBE

Has the company been certified as a minority/woman-owned business by any governmental agency?

_____ No _____ Yes

If yes, specify the governmental agency: _____

Date of certification: _____

“Paperless Agenda Solution”

I. Introduction and Scope of Services

The City of Plano is requesting competitive sealed proposals to provide a “paperless agenda” solution for the City of Plano. The purpose of this system will be to lower cost, save time, reduce errors, and increase the quality and efficiency of producing city council and other agendas.

The solution will provide an item tracking system with a logical work flow method of authorization for agenda items requiring multiple users input, changes, review, and authorizations from users within and outside (city staff with active directory accounts) who may be away from their workstation and require internet access to the City of Plano network.

The award of the contract will be based on the vendor’s proposal as it pertains to this document and needs of the City of Plano. The contract term will be for four years which includes, but is not limited to system design, installation, implementation, ongoing support, software upgrades and maintenance.

II. Pre-Proposal Conference and Site Visits

Pre-Proposal Conference

A non-mandatory pre-proposal conference will be held on line Bid Sync March 30, 2009 from 1:00 – 3:00 p.m. to answer any questions concerning the proposal or requirements. All questions for this proposal will be answered at the pre-proposal conference. The deadline for all questions will be 3:00 p.m. March 30, 2009.

III. Network and Server Hardware/Software Requirements:

To provide consistent maintenance, support, and hardware compatibility, the City of Plano will provide all networking, hardware, and servers for the solution provided. The vendor is required to provide the recommended infrastructure (networking switches and server hardware unless special requirements are necessary) to meet the solution, but the equipment cost for these devices should not be included in the proposal.

- Each vendor is required to submit a vendor questionnaire as requested in Submittals Section XI.*
- Hardware – The vendor is required to provide the City of Plano with the recommended (not minimum) network, hardware, and server specifications to support their solution. In order to maintain system support and maintenance, the City of Plano will provide all servers for*

this solution. The City of Plano can provide stand-alone servers but desires software that can be ran on an Enterprise Virtual Environment server infrastructure.

- *Software – The vendor is required to provide the City of Plano with the recommend (not minimum) software applications such as SQL (standard or enterprise) necessary to support their solution. The City of Plano desires that all SQL applications utilize Microsoft SQL and not SQL Express or MYSQL due to licensing agreements. All customized programming will become the property of the City of Plano.*
- *Security – The vendor is required to provide the City of Plano with the permissions necessary to install, maintain, and utilize the product for the administration and clients. The City of Plano requires that the product interface with the current Microsoft Active Directory 2007 or higher. The City of Plano desires that the system utilizes service accounts and does not require continuous logon for sessions. The client should require user privilege's (not administration privileges) to run the client software after initial installation.*
- *Firewall and Web Applications – The City of Plano requires that the vendor list all recommended firewall ports and IIS settings necessary to run their product for web based applications.*
- *The City of Plano desires enterprise or site licensing for software and not individual client or user license. The City desires options for either a web based product or a solution that does not require client software to be loaded onto individual (client) machines.*

IV. Requirements:

Each vendor is required to provide a scope of services worksheet as requested in Submittals Section XI. Vendor must provide documentation in its proposal which will be sufficient to convince the City of Plano that the vendor has the financial resources, corporate stability; the management background and experience; the software development capabilities, the technical competence; the proven experience in the design, construction, installation, integration, implementation, management and operation of a paperless agenda solution; and any other factors which demonstrate the ability of the vendor to provide a reliable and efficient system to meet the City of Plano requirements. The information provided shall be sufficient in every way to demonstrate to the City of Plano that the vendor has the capability of performing the scope of work as described in this competitive sealed proposal and in conformance with all applicable laws and regulations. The selected contractor/vendor/s are responsible for obtaining any permits necessary to complete the work covered at its own expense prior to starting any work.

The intent of the following information is to provide the Vendor with a project overview so that they may design, install, and maintain a paperless agenda

solution for the City of Plano. The following is a list of requirements provided by departments that have an interest in this project. Each Vendor shall consider the following information and then offer their own unique solution that meets the minimum requirements contained herein.

- *Customized system – System will be customized to meet the needs of City of Plano regarding forms, agenda categories, work flow, authorization, and editing. The desired system would allow the City of Plano to make “tweaks” to the system.*
- *Delegation of approvals – The system should have the capability that certain individuals are pre-designated in the system to act on the behalf of someone absent and have the record tracking “stamp” the alternate approval. For example if the City Manager is out of the office, the system should delegate his authority to a pre-designated Executive director.*
- *System must notify members (preferably by email (Microsoft Outlook/Exchange) with options of other formats), based on the workflow process that certain items require executive approval to proceed in the process. – Our basis for this is that the software will have the routing logic for specific items (such as planning and legal) that may have different routing processes based on workflow logic.*
- *Product will have the capability to attach documents to an item with the following formats: Documents attached individually (ordinance, exhibit, memo)*
 - *All Microsoft Office Suites Products*
 - *.PDF Adobe and Microsoft formats*
 - *.tif, .gif, and .jpg graphic formats*
- *Product will have the capability to track an item from initial input throughout the process until final document (such as a Visio flowchart). – For example, if we have a “hot” item that we are pushing through the system, we want the ability to know who we are waiting on to approve the document to keep the process moving.*
- *Product must have the ability to pull up ordinances and resolutions following council meetings to assign the numbering of pages (exhibits also). Adobe is the preferred format.*
- *Product must provide the security that once an item is placed “in for review” that the document cannot be changed without the approval of the City Secretary or Assistant City Secretary.*
- *System requires a “results agenda” with the ability to print and post to a web site.*
- *System must provide options to provide different formats for the distribution of the agenda. - For example if the email server is down or the internet is not accessible, the City must be able to produce the agenda on a memory stick, CD or some other format to deliver the agenda.*
- *System must provide an “auto agenda builder” with the ability to edit the agenda (tweak and rearrange items as needed) and auto-conversion of*

information to a .PDF format.

- System must provide parallel tracking, email notification to those next up for approval. Email notification must be customized to allow preapproval to members within a department to then forward to department head for approval to continue in the tracking system. For example – The legal and budget departments have individuals assigned to differing departments. They would need a parallel system for “pre-submittal” of items when corrections are input is being received. Once the item is “fully” prepared for submittal, it can be placed into the queue and begin its official routing. This re-submittal may need to be accomplished outside of the paperless agenda system simply through emails and attachments routed by departments. It would be easy to roll into the training session for official submittal.)
- Items once in the “box” must be the same as on the agenda. (System must prevent changes on documents that have been approved.)
- Ability to cut and paste captions (automated is preferred)
- The system must have the capability to limit the number of approving members in a department. System must provide the logic to route documents based on the authorization needs and workflow of the City of Plano. – For example, the Director of Finance should only see documents that require his authorization for budgeting and not have to view documents such as resolutions that do not require it.
- System must be compatible with existing laser fiche system. Documents in Laser fiche are natively stored as .tif documents. Laser fiche will convert MS office product file types. It will store any Windows-compatible file type, such as .PDF, but the search and index functions of the search engine will not “see” these documents. The preferred format is a .tif document. – We are currently on version 7 of the Laserfiche software product.
- System must be compatible with the public information Dias and Swagit systems. – The Dias system is a DVI based AMX NI-400 switching system in the Council Chamber. This system constitutes control linkage to the Dias and Podium and operates the projector, S-VHS, Slide, DVD, PowerPoint computer, audio system, and lighting equipment in the council chamber. If the proposed system integrates with the Dias and Swagit systems, this will require meeting with the supplier to make sure that the systems will interface with no interruption of operational ability.
- System Web based solutions are required to follow Microsoft standards based on secure DMZ zones. The IIS is required to be in a separate DMZ zone from a SQL server requiring two servers or a shared database in the DMZ zone. Any web based design solutions will require input of the DMZ infrastructure from the City of Plano.

Beyond the minimum requirements for this CSP, the City of Plano desires additional features/options of the product that will also be weighed during the

evaluation process to fulfill the requirements of the proposal and needs of the City of Plano.

- *The desired system should have the ability to create items in a similar fashion to our current processes. – The City of Plano desires that the product has the ability to utilize our current forms and templates for documents and templates.*
- *Council agenda may be viewed on Blackberry devices.*
- *System should have the capability to provide a “lockout” feature. For example if the deadline for submitting agenda items is 12:00 noon on Tuesday we are requesting that the system will prevent users from submitting items during non designated hours. (Following Executive Review allow the City Secretary staff the ability to unlock for specific departments to permit items directed by Council/City Manager/Executive Directors)*
 - *System should produce a “draft agenda that can be printed, saved to a network drive etc.. for Executive Review sessions*
 - *System should provide a query system allowing for searches of prior agenda items and their backup material*
 - *System should include folders for upcoming meeting dates so that departments can work ahead and place items in the appropriate folder.*
- *Desired system provides that the department or person entering an item or document be required to make edits to the item.*
- *Desire a system that has the capability to override/bypass the workflow approval process for minor typos. – For example – The following item has made it through 20 approvals and is ready for the final draft and we noticed a typo – The word “the” was actually typed as “thw”. This does not change the content of the document and should not require the entire document to go back through the approval process for such a small change, however, the system should provide true electronic routing, no matter how insignificant the change. – This is almost a contradicting statement, so we are open to hear suggestions and solutions of how your product deals with these types of scenarios.*
- *The City of Plano desires a system that provides options for citizen access to the agenda once posted. Viewing of individual items and individual backup possible without the need to pull up the entire packet.*
- *Desire a system that is compatible with touch screen technology to access during the meeting.*
- *Desire a system that permits council members the option to make notes that only affect their copy of the agenda.*
- *Desire a system that requires a true electronic signature opposed to a check mark.*
- *Desire a system that gives council members the ability to pan and zoom large plans, drawings, and maps.*

V. Training

In order to accommodate the number of users and different levels of educational needs (based on the responsibilities of the individuals participating), the vendor may be required to hold up to 4 sessions of training. The City of Plano desires an onsite classroom environment with hands labs and practices for approximately but not limited to forty (40) users. All training cost including any travel and expenses must be included in the final cost of the product and services.

VI. Warranty/Ongoing Support/Maintenance

The City of Plano requires ongoing support, maintenance and upgrades of the product. The City of Plano desires the following:

- *A four year contract for support and maintenance of the product and services*
- *Vendor should provide phone support for product 24/7/365*
- *Vendor should provide on-site support of within a four-hour response time for escalated items. City of Plano has the right to escalate any ticket to an on-site status.*
- *City of Plano is entitled to any product software patches, enhancement/core releases, or updates to the product during the maintenance contract period.*
- *Vendor should support all Microsoft updates and patches to server and client operating systems.*
- *All vendors are required to submit a Vendors questionnaire as requested in Submittals Section XI. Include information for all warranties, service and support.*

VII. Qualifications and Subcontractors

Each vendor is required to submit the qualifications worksheet as requested in Submittals Section XI. This section should include resumes of the proposed project team chosen to implement this system. The resumes should be the lead team limited to five (5) resumes.

Vendor will also explain on the worksheet the use of subcontractors, if any, that will be used on any facet of the contract.

VIII. Relevant Project History

Each vendor is required to submit relevant project history worksheet as requested in Submittals Section XI..

This section should include descriptions of representative projects of similar size and scope (maximum of 5 project descriptions) that have been completed within

the last five (5) years. Each project description should be labeled 1-5 and each representative project description should include:

Client Name

Contact Name

Phone Number

Dates of Service

Brief description of service provided

City of Plano or their designee reserves the right to request information from any source so named.

IX. Submittals

Submit six (6) hard copies and one (1) original, of your proposal to the City of Plano and submit the following information:

- A. Title page: Showing the proposal subject; the firm's name; the name, address and telephone number of a contact person; company location and size, and the date of submission.
- B. Executive summary: State the submitters understanding of the equipment and service requested and the ability to meet the City's objectives and specifications.
- C. Relevant Project Experience Worksheet (Attachment A) - This section should include descriptions of representative projects of similar size and scope (maximum of 5 project descriptions) that have been completed within the last five (5) years. Each project description should be labeled 1-5 and each representative project description should include:
 - Client Name
 - Contact Name
 - Phone Number
 - Dates of Service
 - Brief description of service provided

City of Plano designee reserves the right to request information from any source so named.
- D. Vendor Questionnaire (Use Attachment "B") – This questionnaire includes all equipment recommend for this solution and recommended settings and specifications.
- E. Qualifications Worksheet (Use Attachment "C") - This worksheet should provide the top five key players for implementing the solution and their qualifications, certifications, and relevant project experience and information on the use of subcontractors.
- F. Scope of Services Worksheet (Use Attachment "D") – This section should address the vendor's understanding of the services, technical requirements and related problems. This section should include, but not be limited to, the overall scope of the project, warranties, maintenance and a description of the final system that is recommended to be implemented. Each vendor also has an

opportunity to present any options that may be available for the desired features requested by the City of Plano.

G. Literature: This optional section shall contain cut sheets, software descriptions, standard brochures, or other relevant information.

H. Cost - Vendor shall provide a detail cost analysis and breakdown for the planning, designing, implementation, maintenance, and future cost to support and maintain the Paperless Agenda Solution system.

NOTE: Cost of the proposal must be submitted in a separate sealed envelope clearly marked as such.

X. Evaluation Criteria

The Evaluation Committee will review and evaluate each of the properly submitted written proposals. The purpose of the evaluation process is to (1) to examine the responses for compliance with this request for information; and (2) to identify the proposals that will meet or exceed the requirements to the City of Plano.

The City of Plano may require a Vendor to give oral presentations and be required to answer questions raised by the Evaluation Committee. Any costs a Vendor incurs in association with such presentations shall be the responsibility of the vendor. The purpose of the oral presentation is to give the Evaluation Committee an opportunity to pose any questions that may have arisen during the review process and to give the Vendor an opportunity to elaborate on how specific services will be furnished and its ability to deliver those services.

Evaluation Criteria Weights

Scope of Services (25%)

The scope of services evaluation will be based on the vendors overall understanding of the project and how the proposed solution meets the requirements and provides options for the desired features that have been requested in Section XI.A,B,F and G.

Project History (25%)

The City of Plano will evaluate whether the vendor has the financial resources, corporate stability; the management background and experience; the software development capabilities, the technical competence; the proven experience in the design, construction, installation, integration, implementation, management and operation of a paperless agenda solution; and any other factors which demonstrate the ability of the vendor to provide a reliable and efficient system to meet the City of Plano requirements. The evaluation will be based on the information submitted from Section XI.C,E,F and G

Compatibility (15%)

The evaluation for compatibility will look at how well the product adapts to the current network infrastructure and systems. The ease of implantation, maintaining the system, user functionality, and ease of use are the basis of requirements for this proposal and how it applies to the needs of the City of Plano. The evaluation will be based on the information submitted from Section XI.D

Warranty/Support/Maintenance (15%)

The evaluation will be based on the life of the product, and the options available for the maintenance and ongoing support of the product as requested in Section XI.D.

Qualifications (10%)

This evaluation is based on the overall team qualifications and relevant experience and to how it relates to this project as submitted in Section XI.E

Cost (10%)

Vendor shall provide a detail cost analysis and breakdown for the planning and implementation of the Paperless Agenda Solution system. Cost of the proposal must be submitted in a separate sealed envelope clearly marked as such.

XI. Best and Final Offer

The City reserves the right to request a Best and Final offer from any or all proposers.

Attachment "A"
Project History Worksheet

Vendor is to list up to five experience/awarded contracts within the scope of work during the past five years. Please use as much space as necessary. You are not limited to the space below.

1. Client Name: _____
Contact Name: _____
Phone Number: _____
Dates of Service: _____
Brief description of service provided: _____

2. Client Name: _____
Contact Name: _____
Phone Number: _____
Dates of Service: _____
Brief description of service provided: _____

3. Client Name: _____
Contact Name: _____
Phone Number: _____
Dates of Service: _____
Brief description of service provided: _____

4. Client Name: _____
Contact Name: _____
Phone Number: _____
Dates of Service: _____
Brief description of service provided: _____

5. Client Name: _____
Contact Name: _____
Phone Number: _____
Dates of Service: _____
Brief description of service provided: _____

Attachment "B"
Vendor Checklist

Hardware:

Describe the recommended system redundancy or fault tolerance that your system provides. If your system does not require these feature, describe your system support polices.

To provide consistent maintenance, support, and hardware compatibility, the City of Plano will provide all networking, hardware, and servers for the solution provided. The vendor is required to provide the recommended infrastructure to meet the solution, but the equipment cost should not be included in the bid. List any recommended not (minimum) requirements for servers and hardware associated with this project.

List the types of networking requirements for your product or services. Identify how many network connections, speed, duplex, or fiber connections are needed to support the equipment identified in this solution.

The City of Plano can provide stand alone servers but desires software that can be ran on an Enterprise Virtual Environment server infrastructure. Does your product/service support enterprise virtual servers? If not – Why?

Software:

Does the software in this solution support the latest Microsoft service packs and security updates? How often do you comply with the latest updates and patches?

Who updates the system with patches and upgrades? If the customer is responsible for updates and patches, what is your notification system for authorizing the applying of these updates?

Does the product require a browser interface? Does your product requires that IIS be loaded onto the server?

Does the product utilize inbound or outbound email services?

Does the product require a database? Does the system support Microsoft SQL and can the database be run on a shared SQL server with other databases?

Does your product use MySQL or any other database than Microsoft SQL. Does this database software recommend ongoing license, support, or maintenance?

Does your product supply an agent for CommVault backups? What specifically needs to be backed up on the product?

Security:

Does the product require administration rights to run? Does the product ran as a service, or must the administrator be logged in at all times for the software to operate?

What permissions are needed by the client to run the product? Does the common user need administrative rights and permissions?

What ports does your application/s need open to penetrate a firewall? What ports does your application use?

Does your product have any know issues with AntiVirus or Spam Blocker program – specifically Symantec or CA? Do any directories need to be omitted from scanning?

How do you monitor your product, or assist in supporting your product? Do you require/desire Web Access, or a VPN connection?

Does your system require FTP services? How and why?

Support:

What training is available? What is your recommended training?

What are your hours of support? How do we contact support? What warranties, are included? What are the SLA and response times for support?

Attachment "C"
Qualifications Worksheet

Name: _____

Title: _____

Project Role: _____

License, Certifications, and Relevant Project Experience:

Name: _____

Title: _____

Project Role: _____

License, Certifications, and Relevant Project Experience:

Name: _____

Title: _____

Project Role: _____

License, Certifications, and Relevant Project Experience:

Name: _____

Title: _____

Project Role: _____

License, Certifications, and Relevant Project Experience:

Name: _____

Title: _____

Project Role: _____

License, Certifications, and Relevant Project Experience:

List any work that is subject to be contracted by another party other than your company. This includes all subcontractors, vendors, and suppliers. Describe the role that the vendor/subcontractor will participate in this project. Who provides the support for the vendor/subcontractor work when the project is completed? Is this provided for in the maintenance contract?

Attachment “D”
Scope of Services Worksheet

Each vendor is required to provide documentation in its proposal which will be sufficient to convince the City of Plano that the vendor has the financial resources, corporate stability; the management background and experience; the software development capabilities, the technical competence; the proven experience in the design, construction, installation, integration, implementation, management and operation of a paperless agenda solution; and any other factors which demonstrate the ability of the vendor to provide a reliable and efficient system to meet the City of Plano requirements. The information provided shall be sufficient in every way to demonstrate to the City of Plano that the vendor has the capability of performing the scope of work as described in this competitive sealed proposal and in conformance with all applicable laws and regulations. The selected contractor/vendor is responsible for obtaining any permits necessary to complete the work covered at its own expense prior to starting any work. Please use as much space as necessary. You are not limited to the space below.

Describe your understanding of the scope of services and the solution you will provide:

Beyond the minimum requirements for this CSP, the City of Plano desires additional features/options of the product that will also be weighed during the evaluation process to fulfill needs of the City of Plano.

List any of the City of Plano desired features that are available in your product:

THIS PROPOSAL FORM MUST BE SUBMITTED UNDER SEPARATE COVERCITY OF PLANO PROPOSAL FORMCSP NUMBER 2009-87-CCSP for Paperless Agenda Solution

We propose to furnish materials, labor, and equipment in order to accomplish the work in accordance with specifications:

IMPLEMENTATION –

Cost for planning, designing, and implementation of the Paperless Agenda Solution System.

Proposal Amount: \$ _____

MAINTENANCE –

Estimated annual amount of future cost to support and maintain the Paperless Agenda Solution System.

Proposal Amount: \$ _____

The undersigned hereby certifies that she/she understands the specifications, has ready the document in its entirety and that the bid prices contained in this CSP have been carefully reviewed and are submitted as correct and final. Proposer further certifies and agrees to furnish any or all products/services upon which prices are extended at the price offered, and upon conditions contained in the specifications of the CSP.

Proposer further declares and affirms that no person or office in this sole Proprietorship, Partnership, Corporation or Board has or will have during the term of this contract, a Prohibited Interest as defined in the City Charter Section 11.02 and the City's Code of Conduct.

Proposer further understands that and acknowledges that the existence of a Prohibited Interest at any time during the term of this contract will render the contract null and void.

The following information must be filled out in its entirety for your bid to be considered:

COMPANY NAME: _____

ADDRESS OF PRINCIPAL PLACE OF BUSINESS: _____

PHONE/FAX OF PRINCIPAL PLACE OF BUSINESS: _____

ADDRESS, PHONE/FAX NUMBER OF MAJORITY: _____

OWNER PRINCIPAL PLACE OF BUSINESS: _____

AUTHORIZED REPRESENTATIVE: _____

NAME/TITLE

DATE

SIGNATURE: _____

ACKNOWLEDGE ADDENDUM: #1____ #2____ #3____ #4____ #5____

Question and Answers for Bid #2009-87-C - CSP for Paperless Agenda Solution

OVERALL BID QUESTIONS

There are no questions associated with this bid. If you would like to submit a question, please click on the "Create New Question" button below.

Question Deadline: Apr 30, 2009 3:00:00 PM CDT