	City of Marquette
	REQUEST FOR PROPOSALS
	RFP #24-06 Agenda Management Software
	April 17, 2024

Deadline and RFP Opening will be at 2:00 p.m., May 21, 2024. Location of the opening will be at, City Hall Building, Room 103, 300 W. Baraga Ave, Marquette, MI 49855. RFPs must be in sealed envelopes clearly identifying the RFP title. <u>No fax or electronic RFPs will be accepted</u>. Bid specs can be found on the City website at www.marquettemi.gov/bids

Mail Proposals To:

City of Marquette
ATTN: Katherine Burnette, Finance Department
300 W. Baraga Ave.
Marquette, MI 49855

The City of Marquette reserves the right to reject any and all bids if judged not to be in the best interest of the City.

Sean P Hobbins
_____
Sean Hobbins
Assistant City Manager

For questions or further information, contact: Kyle Whitney
                                                        City Clerk
                                                        300 W Baraga Ave, Marquette, MI 49855
                                                        kwhitney@marquettemi.gov

CITY OF MARQUETTE
REQUEST FOR PROPOSAL
AGENDA MANAGEMENT SOFTWARE

SECTION I -BACKGROUND AND GENERAL INFORMATION

1.1 PROJECT DESCRIPTION

The City of Marquette (hereafter referred to as "the City") Clerk's Office is seeking sealed proposals for an Electronic Agenda and Meeting Management Solution, RFP 24-06, that manages the compilation and publication of City Commission (and subordinate governmental organization) agendas, supplemental materials, minutes, and related documents and records. The preferred solution will implement pre- and post-agenda workflow management capability processes that include controls for revising and finalizing agenda materials submitted by various internal organizations, as well as management controls for approval, publication, distribution, and archiving of all managed artifacts and materials.

1.2 TURNKEY SOLUTION

Proposals shall be for the entire solution as specified. The Respondent is to ensure that a complete, integrated and optimized "turnkey" solution for an Electronic Agenda and Meeting Management Solution is proposed and that nothing remains to be purchased or supplied by the City. Proposal award for the Electronic Agenda and Meeting Management Solution will be made to a single Respondent who will assume responsibility for migrating current data, configuring and installing any necessary software, and performing a complete and thorough system test, including software, processes, equipment, configurations and related materials provided under these specifications.

It shall be the responsibility of the Respondent to notify the City when the system is ready for delivery. The Respondent will provide the City with a transition and acceptance plan that will provide for verification/completeness of the provided solution, services listed within this RFP, and to include the products and services necessary to meet the total operational requirements of the project. The Respondent shall provide all necessary software, online services, and/or special equipment required to perform the scope of work and not specifically mentioned herein without claim for additional payment.

All software, online services, and/or special equipment brought on-site or connected remotely to the City of Marquette network, or accessed via online services by City of Marquette users will be certified by the Respondent to be free from viruses, Trojans, back-doors and all other destructive and nondestructive malicious code before connection to the City network. The Respondent will provide a copy of all security certifications and policies utilized within the proposed solution with the proposal submission. All project services are to be provided from a single Respondent. Quality of services shall be at or above the level of professional quality performed by experts regularly rendering this type of service.

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The Contract Administrator shall make the determination of acceptable quality. The services to be provided are described through the scope of work and must be completed fully in accordance with the specifications.

1.3   PROJECT SCHEDULE

DATE	ACTIVITY
April 17, 2024	RFP Published/Distributed
April 17 – April 23, 2024	Questions Accepted/Responses Distributed
May 21, 2024	Proposal Due Date
May 29, 2024	Proposal Evaluations Completed
June 10-14, 2024	Demo Products
June 19, 2024	Selection Notice Issued
July, 8, 2024	City Commission Approval
July, 10, 2024	Contract Executed
July 15- Oct. 31, 2024	Implementation / Transition
Oct. 21, 2024	Acceptance Testing
Oct. 31, 2024	Final Acceptance and "Go Live" Date
SELECTED VENDOR SUBJECT TO COMMISSION APPROVAL NOTE: This schedule is included for informational purposes only, and is subject to change at the City's discretion	

1.4   CONTACT PERSON
The City Clerk's Office has issued this Request for Proposal. All contact regarding this RFP is to be directed to:

Kyle Whitney
City Clerk
City of Marquette
300 W. Baraga Avenue
Marquette, Michigan 49855

Fax: (906) 228-8394
Email: kwhitney@marquettemi.gov
www.marquettemi.gov

Note: All questions regarding this RFP are to be submitted via email only and responses will be published on the City's website (www.marquettemi.gov/bids) for consistency. All vendors are responsible for keeping up to date with latest publications during the RFP process.

1.5   CONTRACT ADMINSTRATION

Following the signing of the contract, all communications concerning the contract must be directed to:

Kyle Whitney
City Clerk
City of Marquette
300 W. Baraga Avenue
Marquette, Michigan 49855
Email: kwhitney@marquettemi.gov

1.6   PROJECT SITE LOCATION

If on-site implementation of the web-based system is required, it will be conducted at the following location:

City Clerk's Office
City Hall
300 W. Baraga Avenue
Marquette, Michigan 49855

If on-site implementation is required, the City will require visits to additional locations within the City for setup and testing:

Information Technology Services
City Hall
300 W. Baraga Avenue
Marquette, Michigan 49855

1.7   CHANGES IN THE RFP AND QUESTION RESOLUTION

Should any prospective Respondent be in doubt as to the true meaning of any portion of the solicitation, or should the Respondent find any ambiguity, inconsistency, or omission therein, the Respondent shall make a written request for an official interpretation or correction. Such requests must be submitted through email to Kyle Whitney, City Clerk, at kwhitney@marquettemi.gov, no later than **April 23, 2024** at 12:00 p.m. The person making the request shall be held responsible for delivery and verification of receipt.

The City's staff will make such interpretation or correction, as well as any additional provisions that the City may decide to include, only as a proposal addendum. Staff will email addendums to each prospective respondent recorded as having received a copy of the solicitation and post the addendum on or before **April 23, 2024** at 4:00 p.m. on the City's website. Any addendum issued by the City shall become part of the solicitation. Respondents should consider issued addendums in preparing their proposal. Only addenda duly issued by the City shall be binding. Any errors of omission in any portion of the submittals shall not be the responsibility of the City.

1.8   PROPOSAL RECEIPT

Proposals must be received by the City of Marquette and sent to the attention of:

City of Marquette
Attn: Katherine Burnette
300 W. Baraga Avenue
Marquette, Michigan 49855

on or before May 21, 2024 at 2:00 p.m. Prospective submitters are responsible for the timely receipt of their proposals. All proposals become the property of the City of Marquette once received, whether awarded or rejected. **Late proposals will not be considered.**

1.9   SELECTION CRITERIA

All submissions shall be evaluated with the emphasis placed on the Respondent's ability to meet the City's requirements, the responsiveness of the proposal, cost, and the criteria specified below. A Selection Committee composed of City employees from the City Manager's Office, the City Clerk's Office and the Office of Information Technology Services will evaluate responses to this solicitation. Submissions will be evaluated through a weighted point system that will include, but will not be limited to, the areas outlined:

1. **Quality, Completeness and Technical Accuracy of submission** **(10 pts)**
2. **Professional Qualifications of Company and Team Members to be assigned** **(15 pts)**
3. **Project Implementation Plan** **(25 pts)**
4. **Experience with similar projects of size and scope/ability to execute requirements** **(25 pts)**
5. **Cost proposal alignment with budget limitations and fiscal necessity** **(25 pts)**

The Selection Committee will initially evaluate responses to the RFP to decide which Respondent(s), if any, they will interview and/or from whom they will request a demonstration. During the interview process, the selected Respondent(s) will have the opportunity to discuss in more detail their qualifications, their experience, the project plan, processes proposed, and their fee proposal(s).

1.10   COST PROPOSAL EVALUATION

The City reserves the right to accept other than the lowest Cost proposal if evaluation determines that to be in its best interest. Proposals whose costs do not accurately represent a reasonable cost for the services being purchased may be rejected.

Cost proposals will be evaluated in relation to technical completeness. The City will seek to enter into a contract with the Respondent with the highest technical accuracy, most complete, accurate and detailed project plan, and most favorable price. If differences cannot be resolved, the City may open negotiations with the Respondent with the next highest technical completeness.

Cost proposals for any additional services noted in the Proposal(s) acceptable to the City will be handled by a separate agreement.

1.11   RESERVATION OF RIGHTS

The City of Marquette reserves the right to accept any proposal or alternative proposal in whole or in part, to reject any or all proposals in whole or in part, to waive irregularities and/or informalities in any proposal, and to make the award in any manner deemed to be in the best interest of the City.

SECTION II - SCOPE OF WORK/REQUIREMENTS

2.1   RESPONDENT BACKGROUND

To be considered responsive to this solicitation, a prospective Respondent must:

1. Have a minimum of 5 years' experience in providing implementation to a web-based system similar in size and scope to the City's current system, noting all experience in the public sector.
2. Provide supporting documentation of relevant experience, including but not limited to type/nature of projects, client, and date of project.
3. Provide a minimum of 4 customer references for which the prospective Respondent has provided services similar to the size and scope of the system specified. Public Sector references are preferred.
4. Certify the completeness of the implementation and warrant the merchantability of the recommended solution to meet the requirements of the City.

2.2   WARRANTIES AND CERTIFICATIONS BY THE RESPONDENT

The Respondent, for purposes of this proposal, and if selected for purposes of provision of services under contract with the City, makes the following warranties:

1. The Respondent warrants that all electronically transmitted data will be free from viruses, Trojans, back-doors and all other destructive and non-destructive malicious cyber security issues before submission to the City of Marquette email system.
2. The Respondent warrants all software, online services, and/or special equipment brought on-site or connected remotely to the City of Marquette's network will be certified to be free from viruses, Trojans, back-doors and all other destructive and non-destructive malicious cyber-security issues before connection to the City of Marquette's system.
3. The Respondent warrants that the quality of its services under this proposal shall conform to the level of professional quality performed by experts regularly rendering this type of service.
4. The Respondent warrants that it has all the skills, experience, qualifications, certifications and professional licenses necessary to perform the services it is to provide for the required implementation pursuant to the scope of work.
5. The Respondent warrants that it has available sufficiently trained employees to provide the services specified within the projected implementation schedule.
6. The Respondent warrants that it is not, and shall not become, overdue or in default to the City for any contract, debt, or any other obligation to the City including real and personal property taxes.
7. The Respondent warrants compliance with all Confidentiality Agreements executed between the Respondent and the City.

8. The Respondent acknowledges that all content and materials maintained under the proposed solution remains the exclusive intellectual and official property of the City of Marquette, and under no circumstances may be accessed, used, or otherwise shared by the Respondent or other related or unrelated parties without the explicit approval of the City of Marquette.

2.3   REFERENCES

Respondents must supply the City with a list of at least 4 companies or public agencies for which the Respondent has completed projects that are <u>essentially equivalent</u> to the Respondent's proposal to the City. Any major difference between the Respondent's proposal to the City and these agencies must be noted. **Failure to list references will result in your company being disqualified.**

2.4   PROJECT PROPOSAL FORMAT

At a minimum, the response to this proposal must have the following sections listed below, and must answer all of the questions in Sections 4, Technical Requirements Questionnaire, to be considered complete and responsive.

Executive Summary. This section shall provide a management overview of the proposed solution. This is intended to be high level in nature and address such general items of interest as project scope, the scope of the individual services and functional components, the risks associated with the effort, and other items that will allow the evaluation team to fully understand the project detail or issue presented.

Implementation Description. This section should be presented in as much detail as possible to describe the important features of the proposal in terms of meeting the overall and specific requirements. It should describe the proposed services in full detail and explain operational and/or procedural features and advantages. At a minimum, it shall contain the following:

- A complete description of the proposed approach to the City's requirements.
- A detailed functional and technical description of the Respondent's proposed implementation.
- A logical diagram of the final user and administrative functions, with process workflow management capabilities. This diagram will describe where new services are to be integrated and where existing services are to be migrated or replaced.
- A discussion of the Respondent's assessment of the major technical and/or management risk areas of the project.
- Optional Proposal Responses recommended or preferred additional services and alternatives.

Section-by-Section Response. This section should be presented in as much detail as possible to describe the important features of the solution(s) in terms of meeting the

overall and specific requirements of all paragraphs and questions presented in the scope of work where an action, feature or service will be provided or performed by the Respondent. The Respondents shall indicate their ability to meet all service requirements and features in Section 3 and include a detailed description of how the services or actions offered can technically meet the requirement.

Project and Implementation Plan. This section should detail the project implementation and management plan for conducting the full system migration to meet the requirements of the scope of work. This should describe the proposed staffing/workload requirements, testing schedule(s), interview plan and dates, cutover, verification, documentation, training and specific dates for all deliverables. It shall be sufficiently detailed and identify progress milestones and should specify the required delivery date for all deliverables.

Professional Qualifications. This section should provide experience summaries, certifications and professional qualifications of all key personnel to be involved in the project, describing their related experience and their proposed roles for the project, including, at a minimum, the following personnel:

• Primary Vendor Representative
• Project Manager Assigned
• Lead Developers(s) and Other Key Staff Assigned

The section should also give a summary of the firm's history, experience and qualifications, vendor certifications, years in business, locations, size, annual sales, product and service offering evolution, scope of lines of business, maintenance qualifications and financial stability. Include sufficient information to enable the City to evaluate Respondent's technical capabilities, viability and resources for supporting and delivering the complete solution and all project deliverables. Company Services Literature and Competitive Market Analysis should be included.

Cost Schedule. To properly assess the allocation of resources in connection with the implementation of the proposal, under separate cover please provide a detailed and itemized breakdown of the complete cost and hours for the proposed system implementation/data migration, acceptance testing anticipated to be expended to meet the City's "go-live" date, including: professional services for all re-engineering, installation, testing and project management as deemed necessary by Respondent to provide a fully functional and secure system. In as much as this is a Request for Proposal, please provide the total cost for the full solution. Also, provide any legacy costs for this software going forward (i.e. fees, licenses, maintenance/upgrades...). Also include an identical breakdown for any Optional Proposal Responses recommended or preferred additional services and alternatives.

2.5   SUBMITTAL COPIES

Respondent shall submit one (1) printed original and three (3) copies of the Technical Proposal, Project Detail documents, and cost proposal(s), as specified in the submission details below. The originals must be clearly marked "ORIGINAL". The original and copies of proposal documents must contain the name of the firm, the RFP number (RFP 24-06), and a title indicating "Technical Proposal", "Project Plan" and "Cost Proposal".

2.6   PROPOSAL AND PROJECT DETAIL SUBMISSION

The proposals are due with all required documentation on or before May 21, 2024, at 2:00 p.m. After review of the submissions, the City reserves all rights, at its sole discretion, to use without limitation any and all information, concepts and data contained therein. You may hand deliver your proposals or use mail/courier services. Respondents agree to honor their proposal for a period of 120 days from the proposal due date.

Printed submissions can be made by delivery to:
City of Marquette
Attn: Katherine Burnette
300 W. Baraga Ave.
Marquette, MI 49855

All envelopes must be clearly labeled "Electronic Agenda and Meeting Management Solution, RFP 24-06." Prospective responders are responsible for the timely receipt of their proposal. All submission material will automatically become the property of the City of Marquette once received, whether awarded or rejected, and will not be returned. **Late or incomplete proposals will not be considered**. No proposal will be considered received unless all requirements of the proposals, original and copies, have been received by the date and time specified above.

2.7   EXCEPTIONS, ALTERNATIVES, AND OPTIONS

The City reserves the right to separately contract for any additional services and/or alternatives proposed.

Where deviations from the specifications may result in lower cost, greater planning life expectancy, and/or improved service, systems performance or implementation timelines, Respondents should describe, in writing with sufficient detail, designs or solutions that are in full agreement with the specification as alternatives to permit evaluation. For example, Respondents must explain why the alternate solution will provide equivalent or improved system throughput and/or implementation timeline efficiencies. Alternate proposal detail shall be labeled "Alternative A", "Alternative B", etc. Copies of each alternate proposal and cost schedule shall be labeled to match each proposal submitted.

2.8   PRESENTATIONS AND DEMOSTRATIONS

Selected Respondents may be asked to provide:

• Presentations of the proposal, project plan and resource requirements to the evaluation committee.
• Live demonstrations of the solution.

All costs incurred by the Respondents in making such presentations will be borne by the Respondent. Following any such presentation or demonstration, proposals may be re-evaluated.

2.9   ACCEPTANCE TESTING

The Respondent shall provide an Acceptance Test Plan of their proposed implementation service with their response to this RFP for approval by the City. The Acceptance Test Plan shall be set forth in a written document and shall define in detail the manner of testing the system (services, software performance, integration, etc.) for its compliance with the functional requirements stated within the RFP. On approval by the City, the Acceptance Test Plan shall become the basis for acceptance of the functional performance of the systems in the contract for services and may be used as a performance indicator for payment purposes. In the event the City requires a modification to the Acceptance Test Plan during the contract term, but before final approval, the Selected Respondent shall respond to the City's request for the change within five (5) business days.

2.10   ACCEPTANCE OF PROJECT DELIVERABLES

All deliverables under the awarded contract are due no later than October 31, 2024 at 4:00 p.m. (City "go-live" date). Respondent will be notified of preliminary acceptance within five (5) business days of delivery. Should the City be in doubt as to the quality or true operation of any portion of the delivered system, or should the City find any ambiguity, inconsistency, or omission therein, the City shall make a written email request for an official interpretation and/or correction before final acceptance of the deliverables. Respondent must warrant that a fully operational system is in place and that all acceptance testing shall be completed no later than **Oct. 21, 2024 at 4:00 p.m**. An invoice for services may be submitted upon notice of final acceptance.

2.11   TIME COMPLIANCE

Project timing is of the essence in the performance of services under this proposal. Work consists of acquiring system knowledge and scheduling resources to perform the work defined in this solicitation. Work to start no earlier than July 15, 2024, 9:00 a.m. and to be completed no later than October 31, 2024 at 4:00 p.m.

SECTION III - SCOPE OF SERVICES

3.1   OVERVIEW

Currently, City staff collaborate to prepare electronic agenda(s) and electronic packet(s) for 25-30 City Commission meetings annually using NOVUSAgenda, which allows staff to create agenda items and attach backup documentation and to then route each item through an approval process prior to being placed on the City Commission agenda. The final electronic version is made available online via the City's NOVUSAgenda site.

The City also uses the NOVUSAgenda portal to host the regular agendas of the City Planning Commission, as well as the minutes for the City Commission, the Planning Commission and the City's 20+ commissions, authorities and advisory bodies. Finally, the City utilizes NOVUSAgenda as a publicly-accessible database of board and committee information, with the rosters and terms of each board and committee made publicly available.

The City is moving away from NOVUSAgenda and is seeking an Electronic Agenda and Meeting Management Solution that will meet current needs. At minimum, this system will provide the capability to manage the preparation, publication, distribution, and archiving of Commission agendas, supplemental materials, minutes, and associated records and artifacts that can be published to the City's website and made accessible to the public.

City Staff supports various Boards, Committees, Commissions, and Task Forces that require a similar automated capability for managing agendas, supplemental materials, meeting minutes and board decisions/recommendations. Any proposal should include a discussion of how the proposed automation solution could be applied to, or scaled and used in conjunction with, the needs of City Boards and Commissions. This discussion can also include plans related to management of board and committee rosters and applications.

Examples of current documents are available online at www.marquettemi.gov and https://marquette.novusagenda.com/Agendapublic.

3.2   DETAILED SPECIFICATIONS

The following checklist features will be included as capabilities within the preferred solution. Respondents must provide in their response a compliance matrix utilizing this table that includes either a "Y", an "N" or an explanatory statement confirming inclusion of required functionality:

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General	
Is the solution able to accept all different types of attachments to support and link to agenda items?	
Do these file types include text, graphics, word processing applications, spreadsheets, acrobat, HTML. XML, Java, and photos and other images?	
Are digital media such as visual files also supported? -TIFF, JPEG, Mpeg, GIF, PDF, BMP, Raw, Scitex, Targa, Pict, AVI, MP4	
Is the solution able to automatically convert attachments used to support agenda items to PDF for printing and public distribution?	
Is the solution able to publish a finalized agenda to the Web with all associated attachments as links to the appropriate agenda item?	
Is the solution able to create an agenda packet for printing?	
Is the solution able to support annotations to attachments?	
Does the solution have reduction capability?	
Is the solution able to work with size D and E documents?	
Does the solution allow an unlimited number of meetings to be added and managed by the system?	
Does the solution enforce cut off dates when allowing users to add agenda items and reports to an agenda?	
Does the solution require agenda items to be approved before an agenda can be finalized/approved?	
When an agenda is finalized, can the agenda be exported into a minute-taking module?	
Does the solution allow revision control of attachments?	
Does the solution allow users to find all selected meeting types between two user specified dates?	
Does the solution allow users to compile, view and print a draft agenda?	
Does the solution allow multiple individual credentialed users to use the system?	
Does the solution allow for the creation of unlimited accounts for credentialed users?	
Does the solution allow for admin-level users to limit the permissions of various credentialed users, such that an individual user can have access limited to a department- or division-level?	
Does the solution allow agenda items to be copied with all associated attachments from one agenda to another?	
Does the solution maintain and make available the history of all agenda items that have been copied to other agendas?	
Does the solution allow agenda items to be moved with all associated attachments from one agenda to another?	
Does the solution allow agenda items and sections to be reorganized on an agenda? This includes being able to move items between sections of an agenda.	

Does the solution assign and display each agenda item a unique item number?	
Does the solution allow agenda items to be located using the item number?	
Does the solution allow users to search through all agendas for agenda items that contain keywords and phrases?	
Does the solution return a list of all search results with links to the agenda item within the agenda where they are located?	
Does the solution allow sections to be added to an individual agenda without modifying all future meetings?	
Is the solution able to maintain an audit trail/version history of all routing through queues and changes that are made to agenda item as it is edited and routed through the system?	
Is the solution able to centrally administer security with secondary security functions administered by departmental administrators?	
Is the solution able to provide authorized personnel with secured 24/7 access to the agendas?	
Is the solution able to give users permission for the type of tasks that can be performed on agenda items?	
Does the solution support simultaneous multiple-user access to all components of the agendas?	
Does the solution allow notes to be added to each agenda item?	
Does the solution have an option to allow notes to be printed on the agenda for each agenda item?	
Does the solution allow long-range notes to be added to an agenda item and be displayed on the long-range draft agenda?	
Does the solution allow actions to be added for each agenda item? The actions can be added manually for each item or selected from a pre-configured list tied to each agenda type.	
Does the solution allow manual activation of an approval workflow management capability for each agenda item?	
Does the solution allow the user to display a graphic of where an agenda item is in a workflow management capability?	
Does the solution display the status of an agenda item, e.g. new, approved, edited, or workflow management capability?	
Does the solution display the owner of each agenda item?	
Does the solution include a mechanism for importing historical agenda items and data and displaying it to the public in a native format?	
Does the solution have the option to easily change the owner of each agenda item?	
Workflow Management Capability	
Does the workflow management capability utilize a Web-based application or service?	

Does the workflow management capability display all workflow management capability queues that a specific user is responsible for at one time and allow the user to decide which queue they would like to access?	
Does the workflow management capability provide a GUI front-end for administering, creating and editing workflow management capabilities with point-and-click or drag-and-drop functionality?	
Does the workflow management capability provide the ability to be routed based on roles or users?	
Does the workflow management capability allow for multiple users to be assigned to a role?	
Is the workflow management capability able to change a user assigned to a role without requiring that the workflow management capability be reconfigured?	
Does the workflow management capability provide the ability to implement dynamic roles?	
Does the workflow management capability allow a user or supervisor to delegate assignments or jobs to other users?	
Does the workflow management capability provide the ability to assign wait periods to each step?	
Does the workflow management capability provide the ability to create user-defined forms?	
Is the workflow management capability able to dynamically change the form as it moves through the workflow management capability?	
Is the workflow management capability response form able to be as simple as collecting one response at each step and complex enough to allow multiple responses (unlimited) at each step?	
Does the workflow management capability allow the agenda to be initiated in a number of ways including (but not be limited to) manually, from another workflow management capability, using an e-form configured as an agenda form or as part of an event?	
Does the workflow management capability have the ability to notify users of jobs in the workflow management capability queue?	
Is the workflow management capability able to notify users through their email system?	
Does the workflow management capability have a publishing capability that will prevent the flow from becoming active when being created or edited until the administrator publishes the respective flow?	
Does the workflow management capability provide the ability to add documents and forms into a repository at any step in the flow as determined by the administrator?	
Does the workflow management capability provide the ability to attach unlimited attachments to a workflow management capability instance?	
Does the workflow management capability limit in any way the type of electronic files that can be attached to the flow?	

Does the solution allow the user to display a graphic of where an agenda item is in a workflow management capability?	
Is the workflow management capability integrated with a file viewer that allows the user to view attachments regardless of the file type without requiring the native application that the attachment was created in?	
Public Access	
Does the solution provide a method to post all agendas to the Web with links to all supporting material?	
Does the solution provide a method to search the content of all agendas posted to the Web?	
Does the solution provide a method to download the agenda and all associated attachments as a single PDF?	
Which common browsers and mobile devices can the public utilize to easily access the agenda?	
Scanning	
Is the solution able to scan attachments into an agenda?	
Retention	
Is the solution able to create retention schedules for all documents associated with an agenda?	
Offline Access	
Is the solution able to download a copy of a meeting with all the supporting material to a folder providing easy off-line access?	
Does the offline agenda version maintain and display all meeting content?	
Does the offline agenda version display all files, actions and notes associated with each agenda item?	
Does the offline agenda version allow each user to make notes for each agenda item?	
Agenda Administrator	
Is the solution able to create an attendee list?	
Is the solution able to track the attendee ID, attendee name and attendee title?	
Is the solution able to assign attendees from the attendee list who are attending a meeting and voting in the meeting?	
Is the solution able to create an action list that can be assigned to any agenda created with a pre-defined meeting type?	
Is the solution able to create tags (e.g., meeting date, meeting type, meeting location, and meeting time) that can be used to populate an agenda when it is being rolled up?	
Is the solution able to apply security to each meeting type?	
Does the solution allow different levels of security within each meeting type?	
Is the solution able to copy meeting types to reduce meeting type creation time?	
Is the solution able to create meeting values?	

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Does the solution allow for each meeting value have properties that allow information sections to be printed on the agenda and tied to the meeting value?	
Does the solution allow for each meeting value must have the ability to have sub-numbering tied to it?	
Minutes	
Does the solution have an interface to a minute-taking module or provide minute-taking capabilities?	
Does the solution allow for the minute-taker to, at a minimum, take roll call, record motions, record votes and to tie those actions back to agenda items?	
Does the solution allow, immediately following the meeting, the minute-taker the ability to create an action summary that can be integrated back into the solution?	
Technology	
Is the solution a database-driven solution?	
Does the solution, at a minimum, integrate with Microsoft 365?	
Does the solution run on Windows 11 Pro and Microsoft Windows Server 2022 Standard Edition, or is it a cloud-based system?	
Does the solution possess multi-layer security features, which limit system access to City authorized personnel?	
Is the solution and its procedures contain audit trails and controls to account for all transactions?	
Is the solution able to administer varying level of access to system components?	
Does the security program/software include password protection?	
Does the system maintain strict control of the privacy, integrity, and safety of all data stored or processed under the terms of the contract?	

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SECTION IV – TECHNICAL

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4.1

Is the solution of a non-proprietary nature?

RESPONSE:

4.2

Describe any functions, features or components that are, or may be, proprietary and why they do not restrict utilization of the system.

RESPONSE:

4.3

Describe how different features are provided such as e-forms and workflow capability.

RESPONSE:

4.4

What language is the workflow management capability application created?

RESPONSE:

4.5

What platform does the agenda management solution run on?

RESPONSE:

4.6

Does the agenda management solution have the ability to logoff users after a user-defined period of inactivity, and to protect privacy of confidential information?

RESPONSE:

SECTION V – TRAINING, SUPPORT AND DOCUMENTATION

Provide training for the City Employee(s) assigned during the project duration, including system setup, configurations, operational system management and system reporting facilities for installed configurations.

Provide detailed documentation of all software installations, including operational configurations and procedures. Documentation including system configurations, operational procedures and business continuity/disaster recovery, and security policies are required.

If not otherwise provided as part of the solution available after the "go-live" date, provide thirty (30) days post-acceptance telephone and email support at no cost during normal 8:00 a.m. - 5:00 p.m. EST business hours for the resolution to questions/clarifications pertaining to the system implementation and configurations in any of the solutions delivered. This is to be provided as part of the implementation plan. Any contracted services for support will commence after the completion of the 30-day period.

SECTION VI – CLIENT REFERENCES

Please list at least four (4) references from ongoing or previous projects that are similar in nature and scope to this project. Public sector references are preferred.

Reference #1

Name of Organization: _____

Address: _____

Telephone: _____   Contact Name: _____

Contact Title: _____   Service Dates: _____

Summary of Project: _____

_____

_____

_____

Reference #2

Name of Organization: _____

Address: _____

Telephone: _____   Contact Name: _____

Contact Title: _____   Service Dates: _____

Summary of Project: _____

_____

_____

_____

RFP #24-06

Reference #3

Name of Organization: _____

Address: _____

Telephone: _____ Contact Name: _____

Contact Title: _____ Service Dates: _____

Summary of Project: _____

_____

_____

_____

Reference #4

Name of Organization: _____

Address: _____

Telephone: _____ Contact Name: _____

Contact Title: _____ Service Dates: _____

Summary of Project: _____

_____

_____

_____

ATTACHMENT A:
PROPOSAL SUBMITTAL FORM
AND SIGNATURE PAGE FOR
REQUEST FOR PROPOSAL NO. 24-06

RESPONSE. Are these items included in your proposals? Respond Yes, No, or NA - Explain No or NA in Respondent Comments (use separate sheet if necessary).

_____ Any exception to the terms and conditions and specifications have been noted and it is understood that such exceptions may result in proposal being deemed non-conforming.

_____ All requested documents have been included (for example, the Project Detail.)

_____ Reference list is attached.

_____ Required performance, labor and material bonds and proof of insurance will be provided, if my firm receives the award.

_____ The undersigned, RESPONDENT, having examined the proposal terms and conditions and specifications, hereby proposes and agrees to perform, the services required within the time stipulated, all work required to be performed, and to provide labor, materials, tools, expendable equipment and insurance necessary to complete, in a professional manner, all of the work required for the City to make use of its services in strict conformity with the specifications and addenda.

The undersigned, RESPONDENT, in accordance with Title VI of the Civil Rights Act of 1964, 78 Stat. 252, 42 U.S.C. 2000d to 2000d-4 and Title 49, Code of Federal Regulations, Department of Transportation, SubTitle A, Office of the Secretary, Part 21, Nondiscrimination in Federally assisted programs of the Department of Transportation issued pursuant to such Act, hereby notifies all bidders that it will affirmatively ensure that in any contract entered into pursuant to this advertisement, minority business enterprises will be afforded full opportunity to submit bids and proposals in response to this invitation and will not be discriminated against on the grounds of race, color, or national origin in consideration of an award.

Signature below certifies that I have carefully reviewed the City's terms, conditions, and specifications on this Request for Proposal and have clearly indicated in writing any exceptions my company is making to these terms, conditions, and specifications, and am authorized to offer such services. Further, the undersigned declares that this proposal is made in good faith, without fraud or collusion with any person or persons. The undersigned acknowledges that it has not received or relied upon any representations or warrants of any nature whatsoever from the City of Marquette, its

agents or employees, and that this proposal is based solely upon the undersigned's own independent business judgment.

Therefore, I/we, the undersigned, hereby agree to provide the services and/or materials as specified if an award is made to my firm without any additional charges, terms, and/or conditions.

COMPANY NAME*:

_____

STREET/P.O. BOX:

_____

CITY, STATE, AND ZIP
CODE:_____
DATE: _____ TELEPHONE: _____
FAX:_____

AUTHORIZED SIGNATURE:

_____

PRINTED NAME OF SIGNER:

_____

TITLE OF SIGNER:

_____

*NOTE: If the RESPONDENT is a corporation, the legal name of the corporation shall be set forth above together with the signature of authorized officer or agents. If RESPONDENT is a partnership, the true name of the firm shall be set forth with the signature of the partners authorized to sign contracts on behalf of the partnership. If RESPONDENT is an individual, their signature shall be placed above.

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