



**ADMINISTRATION & FINANCE  
PURCHASING DIVISION  
CITY OF WORCESTER, MA  
455 MAIN STREET  
ROOM 201, CITY HALL  
WORCESTER, MA 01608  
(508) 799-1220**



**Christopher J. Gagliastro, MCPPO  
Purchasing Agent**

**RFP NO.: 7676-1-W2  
ISSUANCE DATE: 3/10/2022**

**BUYER: Christopher J. Gagliastro**

**AN EQUAL OPPORTUNITY/AFFIRMATIVE ACTION EMPLOYER  
REQUEST FOR PROPOSALS  
NOTICE TO PROPOSERS**

**RFP TITLE: Software – Agenda Management / City Clerk**

***REFER TO PAGE 7 FOR PROPOSAL SUBMISSION INFORMATION***

**General Conditions:**

All proposals are subject to the terms, conditions and specifications herein set forth:

1. **Scope: Provide software and professional services required to implement a new agenda management system as per the attached requirements, terms & conditions, and specifications of the City Clerk of the City of Worcester.**
2. A certified check or bid bond made payable to the "City Treasurer, City of Worcester" in the amount of N/A must accompany this proposal. This must be submitted under separate sealed cover marked "Proposal Security." In the case of default, the surety shall be forfeited to the City as liquidated damages.
3. All terms and conditions are applicable to this proposal except the following section(s) which are hereby deleted from this RFP: 4, 27
4. A performance bond in the amount of N/A will be required. If this proposal is accepted by the City and the Proposer shall fail to contract as set forth in these requirements and to give a bond in the aforementioned amount, within ten (10) days, (not including Sundays, Saturdays, or a legal Holiday) from the date of the mailing of a notice from the City to the Proposer, according to the address given herewith, that the contract is ready for signature, the City may by option determine that the proposer has abandoned the contract and thereupon the proposal and acceptance shall be null and void and the proposal security accompanying this proposal shall become the property of the City as liquidated damages.

**Any prospective proposer requesting a change in or interpretation of existing specifications or terms and conditions must do so within 5 days (Saturdays, Sundays, and Legal Holidays excluded) before scheduled proposal opening date. All requests are to be in writing to the Purchasing Division and are to be in duplicate. No changes will be considered or any interpretation issued unless request is in our hands within 5 days (Saturdays, Sundays, and Legal Holidays excluded) before scheduled proposal submission date.**

**Any inquiries related to technical or contractual matters must be submitted in writing to:**

**Christopher J. Gagliastro, MCPPO  
Purchasing Director  
City of Worcester, City Hall  
455 Main Street, Room 201  
Worcester, MA 01608  
[gagliastroc@worcesterma.gov](mailto:gagliastroc@worcesterma.gov)**

5. Nothing herein is intended to exclude any responsible Proposer or in any way restrain competition. All responsible Proposers are encouraged to submit proposals. The City encourages participation by Minority and Women Owned Business Enterprises (M/WBE).
6. The following meanings are attached to the defined words when used in this RFP.
  - a) The word "City" means The City of Worcester, Massachusetts.
  - b) The word "Proposer" means the person, firm or corporation submitting proposal on these specifications or any part thereof.
  - c) The word "Contractor" means the person, firm or corporation with whom the contract is made by carrying out the provisions of these specifications and the contract.
  - d) The words "Firm Price" shall mean a guarantee against price increase during the life of the contract.
7. All proposals and other documents relating to this RFP are subject to the public records provisions of M.G.L. c.30B, and shall remain confidential until the time specified in c.30B section 6 (d).
8. All material submitted by vendors becomes the property of the City. The City is under no obligations to return any of the material submitted by a vendor in response to this RFP.
9. Each vendor's proposal must remain in effect for at least 120 days from the deadline for its submission. The City will decide upon acceptance within 120 days of submission.
10. It is understood and agreed that it shall be a material breach of any contract resulting from this RFP for the Contractor to engage in any practice which shall violate any provision of

Massachusetts General Laws, Chapter 151B, relative to discrimination in hiring, discharge, compensation, or terms, conditions or privileges of employment because of race, color, religious creed, national origin, sex, age or ancestry.

11. The City reserves the right to accept or reject any or all of the proposals submitted and waive informalities and technicalities.
12. The City will review and analyze each proposal, and reserve the right to interview selected proposers. The City shall select the proposer, which in the City's opinion, has made the proposal best suited to the needs and goals of the City and its operations and deemed to be in compliance with the terms of this RFP.
13. The Contractor will be required to indemnify and save harmless the City of Worcester for all damages to life and property that may occur due to his or her negligence or that of his or her employees, subcontractors, etc. during the contract derived from this RFP.
14. The Contract Agreement will be drafted by the City's Law Department in compliance with the terms of the RFP, and may incorporate the terms of this RFP and of the proposal selected.
15. The Proposer must certify that no official or employee of the City of Worcester, Massachusetts, is pecuniarily interested in this proposal or in the contract which the proposer offers to execute or in expected profits to arise therefrom, unless there has been compliance with the provisions of G.L.C. 43 section 27, and that this proposal is made in good faith without fraud or collusion or connection with any other person submitting a proposal.
16. Any proposal withdrawn after time and date specified, the proposer shall forfeit deposit on proposal as liquidated damages.
17. A vendor conference will be held as follows: N/A
18. The Contractor shall not assign, transfer, sublet, convey or otherwise dispose of any contract which results from this RFP, or its right, title or interest therein or its power to execute the same to any other person, firm, partnership, company or corporation without the previous consent in writing of the City. Should the Contractor attempt any of the above without the written consent of the City, the City reserves the right to declare the Contractor in default and terminate the contract for cause.
19. The Contractor shall obtain and maintain in force at all times during the term of the contract derived from this RFP, insurance coverage pertaining to Public Liability, Property Damage and Worker's Compensation in the following types and amounts:
  - A) PUBLIC LIABILITY INSURANCE - Contractor to supply the City of Worcester with certificates of insurance covering public liability in an amount not less than \$1,000,000.00 to any one person, and not less than \$ 1,000,000.00 on account of one accident.

B) PROPERTY DAMAGE INSURANCE - Contractor to supply the City with certificates of insurance covering property damage in an amount not less than \$1,000,000.00 for damages on account of any one accident, and not less than \$2,000,000.00 on account of all accidents.

C) COMPENSATION INSURANCE - The Contractor shall furnish the City with certificates showing that all its employees shall be connected with the management operations are protected under worker's compensation insurance policies.

20. The Contractor shall carry Public Liability Insurance with an insurance company satisfactory to the City so as to save the City harmless from any and all claims for damages arising out of bodily injury to or death of any person or persons, and for all claims for damages arising out of injury to or destruction of property caused by accident resulting from the use of implements, equipment or labor used in the performance of the contract or from any neglect, default or omission, or want of proper care, or misconduct on the part of the Contractor or for anyone in his or her employ during the execution of the contract derived from this RFP.
21. Prior to starting on the contract derived from this RFP, the Contractor shall deposit with the Purchasing Division, certificate from the insurer to the effect that the insurance policies required in the above paragraph have been issued to the Contractor. The certificates must be on a form satisfactory to the City.
22. All prices quoted must include inside delivery, and set-up in place F.O.B. destination to pre-designated City of Worcester departments.
23. No special charges will be allowed for rigging, packing, crating, freight, express, or carriage unless specifically stated and included in the vendor's proposal.
24. The award to the successful proposer may be cancelled in the event of vendor nonperformance as may be determined by the City.
25. The successful proposer shall comply with all applicable federal, state and local laws, ordinances, and regulations. The awarded contract shall be governed under the laws of the Commonwealth of Massachusetts.
26. Purchases made by the City are exempt from Federal and Massachusetts state taxes and proposal prices must exclude any such taxes. Tax exemption certificates will be furnished upon request.
27. When the contract is executed, a performance bond, in the full amount of the contract, is required. See paragraph 4. The bond will be of a surety company qualified to do business under the laws of the Commonwealth of Massachusetts. The cost of this bond is the vendor's responsibility. Bonds shall remain in force and effect thru the performance of the contract.
28. Expenditures by the City and authorization to spend for particular purposes are made on

fiscal year basis. The City's fiscal year is the twelve month period ending June 30 of each year. The obligations of the City under any agreement to be reached are subject to the appropriation or authorization of the necessary funds. The City agrees to make reasonable efforts to obtain funding and all necessary authorization.

29. No amendment to the contract shall be effective unless it is in writing and signed by authorized representatives of both parties and is accepted by the City of Worcester.
30. The vendor (and its insurers, if any) shall bear all risk of loss or damage to the equipment which occurs in transit to the user site. The risk of loss or damage to purchased equipment shall remain with the vendor until the purchase price has been paid and title has passed. The vendor shall also bear the risk of loss or damage to leased or rented equipment during the City of Worcester's possession and use thereof subject, however to such conditions and limitations as may be stated elsewhere in the contract.
31. The vendor shall not assign or in any way transfer any interest in the contract without the prior written consent of the City provided, however, that claims for money due or to become due to vendor from the City may be assigned to a bank, trust company, or other financial institution without such consent so long as notice of such assignment is furnished promptly to the City. Any such assignment shall be expressly made subject to all defenses, set-offs, or counter-claims which would have been available to the City against the vendor in the absence of such assignment.
32. None of the services to be provided by the vendor pursuant to the contract shall be subcontracted or delegated to any other organization, association, individual, corporation, partnership or other such entity without the prior written consent of the City. No subcontract or delegation shall relieve or discharge the vendor from any obligation or liability under the contract except as specifically set forth in the instrument of consent. Any subcontract to which the City has consented shall be attached to the original of the contract on file in the City of Worcester.
33. Neither party will be liable to the other or be deemed to be in breach of the contract for any failure or delay in rendering performance arising out of causes beyond its reasonable control and without its fault or negligence. Such causes may include but are not limited to, acts of God or the public enemy, fires, floods, epidemics, quarantine restrictions, strikes, freight, embargoes, and unusually severe weather. If the vendor's failure to perform is caused by the default of the subcontractor, and if such default arises out of causes beyond the reasonable control of both the vendor and the subcontractor, and without the fault or negligence of either of them, the vendor shall not be liable for any excess costs for failure to perform, unless the equipment or services to be furnished by the subcontractor were obtainable from other sources in sufficient time to permit the vendor to meet the required delivery schedule. Dates or times of performance will be extended to the extent of delays excused in this section, provided that the party whose performance is affected notifies the other promptly of the existence and nature of such delay.

34. The vendor shall provide to the City of Worcester a warranty and a commitment which clearly states that all equipment and services proposed and supplied by the Vendor, and/or its subcontractors, performs as expected and promised by the Vendor.
35. The vendor represents that no person other than bona fide employees working solely for the vendor, have been employed or retained to solicit or secure this agreement upon an arrangement or understanding for a commission, percentage, brokerage fee, gift or any other consideration contingent upon the award or making of this contract. For breach or violation of the representation, the City shall have the right to annul the contract without liability, or in its discretion to deduct from the contract price or consideration, or otherwise recover the full amount of such commission, percentage, brokerage fee or other consideration.
36. Any contract made by the City in which the Purchasing Agent or any employee of his/her department, the heads of using agencies or any other officer or employee of the City having a part in the placing of such contract is financially interested, directly or indirectly, shall be void.
37. The vendor shall not discriminate against any qualified employee or applicant for employment because of race, color, national origin, ancestry, age, sex, religion or medical handicap. The vendor agrees to comply with all applicable Federal and State Statutes, rules and regulations prohibiting discrimination in employment including: Title VII of the Civil Rights Acts of 1964; The Age Discrimination in Employment Act of 1967; Section 504 of the Rehabilitation Act of 1973; Massachusetts General Laws Chapter 151B, Section 4 (1) and all relevant administrative orders and executive orders.

If a complaint or claim alleging violation by the vendor of such statutes, rules or regulations is presented to the Massachusetts Commission Against Discrimination (MCAD), the vendor agrees to cooperate with MCAD in the investigation and disposition of such complaint or claim.

In the event of vendor noncompliance with the provisions of this section, the City shall impose such sanctions as it deems appropriate, including but limited to:

- 1) Withholding of payments due vendor under the contract until vendor complies.
- 2) Termination or suspension of the contract.

## **SUBMISSION OF PROPOSALS**

38. Proposals must be submitted in two (2) packages according to the instructions below. The City intends to consider responses in the evaluation requirements before considering costs. **Therefore, no reference to pricing may be made in the proposal of evaluation considerations.**

A sealed package containing **the original, 3 copies plus 1 electronic copy on USB drive** of the proposal **must** be labeled as follows:

**Purchasing Agent, City of Worcester**

**Software – Agenda Management / City Clerk – Technical Proposal**

**455 Main Street, Room 201  
Worcester, MA 01608**

**Re: RFP No. 7676-1-W2**

A sealed package containing **one original copy** of the proposal **must** be labeled as follows:

**Purchasing Agent, City of Worcester**

**Software – Agenda Management / City Clerk – Price Proposal**

**455 Main Street, Room 201  
Worcester, MA 01608**

**Re: RFP No. 7676-1-W2**

***Price proposal sheets are located at the end of the specifications / criteria sections.***

**Proposals must be delivered no later than Wednesday, April 6, 2022 at 10:00 AM LOCAL TIME. Late submissions will be rejected, regardless of circumstances.** The City of Worcester is not responsible for submittals not properly marked.

The evaluation and cost proposals will remain confidential until a formal and finalized contract has been executed.

## **RFP EVALUATION**

39. The City of Worcester Purchasing Agent will assign an evaluation team, hereafter referred to as the Selection Committee, to perform a full and complete evaluation of RFP submittals. The Purchasing Agent will ultimately forward a formal recommendation of award to the City Manager who has final award authority.
40. RFP evaluation responses will be evaluated by the Selection Committee based directly upon vendor's response to mandatory and comparative evaluation criteria. Vendors must meet or exceed the mandatory criteria requirements or be rejected as non-responsive.

Comparative criteria will be evaluated by the use of four rating categories as set forth by M.G.L. Chapter 30B:

- 1) HIGHLY ADVANTAGEOUS - Vendor's submittal meets all the stated requirements and offers significant performance above the stated requirements.
- 2) ADVANTAGEOUS - Vendor's submittal meets the stated requirements without risk or disadvantage.
- 3) NOT ADVANTAGEOUS - Vendor's submittal contains some risk or disadvantage but is not unacceptable.
- 4) UNACCEPTABLE - Vendor's submittal fails to meet the standards of the stated requirements.

After proposals have been assigned ratings on the basis of each evaluation criterion, a composite rating will be established by the Selection Committee. Submittals will then be ranked based upon finalized composite rating.

41. The Purchasing Agent will identify the most advantageous proposal based upon the rankings of the Selection Committee and an evaluation of the cost proposals received. The Purchasing Agent will forward a recommendation for award to the City Manager based upon the most advantageous proposal received considering evaluation rankings and cost proposals received.



GIVE FULL NAMES AND RESIDENCES OF ALL PERSONS INTERESTED IN THE FOREGOING PROPOSAL.

(NOTICE: Give first and last name in full; in case of corporations, give corporate name and names of President, Treasurer, and Manager; and in case of firms give names of the individual members)

Name	Address	Zip Code
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KINDLY FURNISH THE FOLLOWING INFORMATION REGARDING BIDDER:

(1) If an Individual or Proprietorship

Name of Owner \_\_\_\_\_

Business Address \_\_\_\_\_

Zip Code \_\_\_\_\_ Telephone No. \_\_\_\_\_

Email \_\_\_\_\_

Home Address \_\_\_\_\_

Zip Code \_\_\_\_\_ Telephone No. \_\_\_\_\_

(2) If a Partnership, Full names and addresses of all partners

<u>Name</u>	<u>Address</u>	<u>Zip Code</u>
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Business Address \_\_\_\_\_ Zip Code \_\_\_\_\_

Tel. No. \_\_\_\_\_

(3) If a Corporation

Full Legal Name: \_\_\_\_\_

State of Incorporation: \_\_\_\_\_ Qualified in Massachusetts? Yes \_\_\_\_\_ No \_\_\_\_\_

Principal Place of Business \_\_\_\_\_  
Street P.O. Box

\_\_\_\_\_  
City/Town State Zip

Email: \_\_\_\_\_

Telephone No. \_\_\_\_\_

Place of Business in Massachusetts \_\_\_\_\_  
Street P.O. Box

\_\_\_\_\_  
City/Town State Zip

Telephone No. \_\_\_\_\_

GIVE THE FOLLOWING INFORMATION REGARDING SURETY COMPANY

Full Legal Name of Surety Company \_\_\_\_\_

State of Incorporation \_\_\_\_\_ Admitted in Massachusetts ? Yes \_\_\_\_\_ No \_\_\_\_\_

Principal Place of Business \_\_\_\_\_  
Street P.O. Box

\_\_\_\_\_  
City/Town State Zip

Place of Business in Massachusetts \_\_\_\_\_  
Street P.O. Box

\_\_\_\_\_  
City/Town State Zip

Telephone No. \_\_\_\_\_

NOTE:

The Office of the Attorney General, Washington, D.C. requires the following information on all bid proposals amounting to \$1,000.00 or more.

E.I. Number of bidder \_\_\_\_\_

This number is regularly used by companies when filing their "EMPLOYER'S FEDERAL TAX RETURN, U.S." Treasury Department Form 941.

AUTHORIZED SIGNATURE OF BIDDER \_\_\_\_\_

TITLE \_\_\_\_\_

DATE \_\_\_\_\_

UNDER MASSACHUSETTS GENERAL LAWS, CHAPTER 30B: SECTION 10, THE FOLLOWING CERTIFICATION MUST BE PROVIDED:

Section 10. A person submitting a bid or a proposal for the procurement or disposal of supplies, or services to any governmental body shall certify in writing, on the bid or proposal, as follows:

"The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals."

(Please Print)

\_\_\_\_\_  
Name of Person Signing Bid

\_\_\_\_\_  
Signature of Person Signing Bid

\_\_\_\_\_  
Company

No award will be made without vendor certification of the above.

***All proposals must include the above non-collusion certificate with submission.***

THE CITY OF WORCESTER  
REQUEST FOR PROPOSALS  
FOR AGENDA MANAGEMENT SOFTWARE



## **Introduction**

- The City of Worcester (“city”), led by the City Clerk, City Manager and Technical Service departments, seeks a company to provide the city with agenda management software to replace a homegrown program that has reached end of life.

## **Minimum Vendor Qualifications**

- All agenda management software companies that respond to this bid are to include a list of at least three (3) references.
- All proposers must have experience working with cities and towns of similar size or larger in population (about 200,000).
- All proposers should include their names, persons of contact, email and phone number.
- All proposers should include a brief introduction explaining how their program can provide increased transparency within the city’s government, through means including but not limited to providing an open data portal for all items introduced within the agenda management software, both historical and current, which can be accessed by the public at all times.

## **Minimum System Qualifications**

Proposers must describe their system’s ability to meet the minimum system qualifications listed below. Please include separate tabs or content for each numbered item listed below.

1. Ability to work in tandem with city’s Cable Services Department by connecting their video and audio recordings of City Council, Standing Committees as well as Board and Commission meetings, with agendas housed within the program. The video streaming shall allow for the use of four video encoders to broadcast multiple meetings.
2. The city seeks a program that is capable of maintaining the various Boards and Commissions housed under the City Manager’s Department. Each Board and Commission’s staff liaison must be able to build their own agendas and minutes and have their own capabilities to *publish* agendas and minutes. Vendor must also be able to migrate all previous data from said boards and commissions ((For a complete list visit <http://www.worcesterma.gov/city-clerk/public-meetings/agendas-minutes> for a full list of data migration)
  - a. Per State of Massachusetts requirements, all agenda publishing must be done within forty-eight (48) hours of a meeting, with the time and date of the publishing being easily viewable to the public. Currently, when an agenda is posted the time is automatically added to the agenda posting. See below for an example.

# STANDING COMMITTEE ON ECONOMIC DEVELOPMENT

## EVENT DETAILS

[< PREVIOUS](#)[NEXT >](#)

### Description

Event URL: <https://zoom.us/j/93387484291>

Event Phone Number: (929) 205-6099

Event Access Code: 933 8748 4291

### Time

Tuesday, March 8, 2022 • 5:00 PM

### Where?

City Hall, Esther Howland Chamber, 455 Main Street - [Map It](#)



One of two meeting chambers situated in Worcester City Hall, this room is named after Esther Howland (1828 - 1904) an artist and businesswoman who was responsible for popularizing Valentine's Day greeting cards in America. Although Valentine's Day cards had been available in America for more than half a century before Esther started her business she was the first person to ever commercialize them in America. Her valentines became renowned throughout the United States and she was called "The Mother of the American Valentine".

[VIEW AGENDA](#)

Posted: Mar 1, 2022 4:07 PM

[Share](#)[Tweet](#)

3. Vendors must be able to set up/create and house each of the city's Boards and Commissions' agendas and minutes, as well as the City's Standing Committees and City Council. Each liaison for every board and commission should be provided their own log in credentials to the program to maintain their own responsible boards/commissions. Each board and/or commission should also have their own workflows.
  - a. City Council
  - b. City Council - Standing Committees
    - i. AD HOC
    - ii. Economic Development
    - iii. Education
    - iv. Finance
    - v. Joint
    - vi. Municipal and Legislative Operations
    - vii. Public Health and Human Services
    - viii. Public Safety
    - ix. Public Service and Transportation
    - x. Public Works
    - xi. Traffic and Parking
    - xii. Urban Technologies, Innovation and Environment
    - xiii. Veterans' Memorials, Parks and Recreation
    - xiv. Discontinued
  - c. Boards & Commissions

- i. Board of Election Commissioners
- ii. Board of Health
- iii. Cable Television Advisory Committee
- iv. Citizen Advisory Council
- v. Civic Center Commission
- vi. Commission for the Preservation of Historic Artifacts, Relics and Military Memorials
- vii. Commission on Elder Affairs
- viii. Community Development Advisory Committee
- ix. Conservation Commission
- x. Diversity and Inclusion Advisory Committee
- xi. Green Worcester Advisory Committee
- xii. Historical Commission
- xiii. Hope Cemetery Commission
- xiv. Human Rights Commission
- xv. License Commission
- xvi. Off-Street Parking Board
- xvii. Other Post-Employment Benefits (OPEB) Liability Trust Fund
- xviii. Parks and Recreation Commission
- xix. Planning Board
- xx. Retirement Board
- xxi. Status of Women Advisory Committee
- xxii. Trust Funds Commission
- xxiii. Worcester Arts Council
- xxiv. Worcester Ballpark Commission
- xxv. Worcester Housing Authority
- xxvi. Worcester Redevelopment Authority
- xxvii. Worcester Redevelopment Authority Citizen Advisory Committee
- xxviii. Zoning Board of Appeals
- xxix. Discontinued
- d. Committees & Groups
  - i. Building Futures, Inc. Board of Directors
  - ii. Central MA Metropolitan Planning Organization
  - iii. Central MA Regional Planning Commission
  - iv. Chapter 139 Hearing
  - v. City Manager's Advisory Committee on Youth
  - vi. City Manager's Energy Task Force
  - vii. Coalition Against Bias and Hate
  - viii. Community Development Block Grant Public Hearings
  - ix. Designer Selection Board
  - x. Lake Quinsigamond Commission
  - xi. Local Emergency Planning Committee
  - xii. Senior Center Committee
  - xiii. Upper Blackstone Clean Water
  - xiv. Worcester Regional Transit Authority Advisory Board
  - xv. Worcester Retirement Board Finance Committee
  - xvi. WRTA Transportation Planning Advisory Group
- e. Public Library

- i. AD HOC
  - ii. Board of Directors
  - iii. Buildings and Grounds Committee
  - iv. Committee on Administration
  - v. Committee on Library Materials
  - vi. Community Services Committee
  - vii. District Task Force
  - viii. Executive Committee
  - ix. Finance Committee
  - x. Joint
  - xi. Marketing Committee
  - xii. Search Committee
- f. Public Schools
  - i. Abby Kelley Foster Charter School Board of Trustees
  - ii. Abby Kelley Foster Charter School Education Committee
  - iii. Abby Kelley Foster Charter School Facilities and Finance Committee
  - iv. AD HOC
  - v. School Committee
  - vi. Spirit of Knowledge Charter Public School Board of Trustees
  - vii. Standing Committee on Accountability and Student Performance
  - viii. Standing Committee on Finance and Operations
  - ix. Standing Committee on Governance and Employee Issues
  - x. Standing Committee on Teaching, Learning and Student Supports

4. The Boards and Commissions database must be able to provide instant reports relative to the composition and demographics of the city's various boards and commissions, including information pertaining to their gender, race, veteran status, disability status, address and city district of residence. It should also be able to differentiate between applicants and confirmed appointed persons.
5. Must be able to create, in concept, a "Unique ID," which would link items that are related to one another on various agendas (i.e. a singular search phrase that shows when an item appears first as a petition, then as subsequent items such as a committee report, ordinance, etc.) (see separate workflow attachments for more information)
6. Program must be able to color code item actions, so as to make clear workflow distinctions (i.e. red color for items where the workflow has been completed and green color for items where the workflow is still in progress)
7. Program must be able to create "jackets" from agenda items. The city uses these jackets as a cover to fold items brought before City Council into thirds to prepare them for physical, permanent housing. Jackets should not be included in the backup of City Council items and only appear for printing purposes.
8. Ability to make the city's entire agenda process automated, including the use of automatic text replacement shortcuts, including but not limited to the following:



- a. Format a listed dollar amount into text
  - i. Current program starts a finance request text.
    1. User enters amount and tabs to have auto text created.
    2. A text template is created that includes the amount entered as a formatted dollar amount and spelled out in long format, as well as placeholders for the account numbers and account names The user enters the account information and a description of the reason for the request.
  - ii. Adding names of City Councilors and/or Standing Committees that propose an Order
    1. City Clerk can select one or more councilors or committees from list of current councilors and committees to include at the end of the agenda item text in parenthesis.
  - iii. Committee agenda items can be forwarded from a City Council to a council agenda as "Report of Committee ..." The new item is automatically prefaced with a text template.
9. Program must be able to make separate and distinct item types that are able to be added to a singular item or "stacked" on top of one other, including but not limited to Chairman's Orders, Chairman's Resolutions, Communications, Communications of the City Manager, Orders, Petitions, Reports of the Committees, Resolutions, Loan Orders, etc.
10. Program must be able to automatically generate the City Clerk's signature on the various item types it creates, so as to endorse the actions taken by the public bodies on certain items.
11. Company must be able to provide evidence that two separate and distinct agendas (i.e. a "City Council" and "City Manager" agenda) can be published separately and then later combined and presented as a single packet. City Council and City Manager agendas should not be able to be viewed by the other department until publishing is completed.
12. Vendor must be able to provide evidence that their program can re-create, or provide a satisfactory replacement for the multiple system workflows that are currently utilized to track where each City Council and City Manager item are in the legislative process. The two major workflows the city currently utilizes and would require are explained here:
  - a. **Orders Workflow:** Within the "Orders" workflow, the City Clerk's Office currently checks off a button to send any given item to the City Manager's office, who in turn are able to assign the item to a department head, who prepares a response and brings the item back before City Council after review. There are a large number of staff members that could touch and weigh in on any given item, which will then need to go through an approval process before being added to the City Manager's agenda.
  - b. **Committee Pending List Workflow:** The "Committees Pending List" workflow is an *essential* aspect of City Clerk operations. Currently the City operates with about ten Standing Committees, each with items that have been referred to them by City Council and have their own meetings based entire on those referred items. The current program we have refers an agenda item in the post-meeting to a pending list, viewable on our city's website, and then tracks those items automatically until the item is heard by the Committee and recommended back to Council. An item may be held at any given meeting, and is automatically returned to the pending list. For more information on this topic, please view our item workflow chart. This practice will demonstrate a vendors ability to provide necessary management functions within the City Council's standing committees.

13. Proposer must demonstrate ability to replicate all attached processes used by both the City Manager and City Clerk Offices within the current, homegrown program.
14. Vendor must be able to provide evidence of a robust use of community engagement, through practices including the automation of public notices.
15. Vendor must show an ability to provide useful functions during meeting management, including but not limited to the use of electronic member voting, in real time and/or after a meeting has taken place.
16. Vendor must show the capability of using an open API.
17. The vendor must be able to register with SAM.gov.(System for Award Management) with the U.S. Government
18. Vendor must be able to demonstrate an ability to provide historical agenda and minutes data migration of the following, including video migration:

(For a complete list visit <http://www.worcesterma.gov/city-clerk/public-meetings/agendas-minutes> for a full list of data migration)

CITY COUNCIL	count(*) estimate
City Council	521
CITY COUNCIL STANDING COMMITTEE	count(*) estimate
Economic Development	131
Education	15
Finance	61
Joint	10
Municipal and Legislative Operations	16
Municipal Operations	53
Public Health and Human Services	72
Public Safety	42
Public Service and Transportation	40
Public Works	127
Rules and Legislative Affairs	14
Traffic and Parking	133
Urban Technologies, Innovation and Environment	8
Veterans' and Military Affairs	15
Veterans' Memorials, Parks and Recreation	5
Youth, Parks and Recreation	31
BOARD AND COMMISSION	count(*) estimate
Accessibility Advisory Commission	55
Board of Election Commissioners	91
Board of Health	61
Cable Television Advisory Committee	11
Citizen Advisory Council	36
Civic Center Commission	46

Commission for the Preservation of Historic Artifacts, Relics and Military Memorials	1
Commission on Elder Affairs	41
Community Development Advisory Committee	39
Conservation Commission	120
Diversity and Inclusion Advisory Committee	30
GAR Memorial Hall Board of Trustees	14
Historical Commission	164
Hope Cemetery Commission	13
Human Rights Commission	59
License Commission	160
Memorial Auditorium Board of Trustees	6
Off-Street Parking Board	6
Parks and Recreation Commission	51
Planning Board	126
Status of Women Advisory Committee	58
Trust Funds Commission	13
Worcester Arts Council	90
Worcester Ballpark Commission	1
Worcester Public Library Board	44
Worcester Redevelopment Authority	69
Zoning Board of Appeals	112
Public Schools and Committees	200
Public Library and Committees	80

#### VIDEO AND AUDIO DATA MIGRATION -

(For a complete list visit <http://www.worcesterma.gov/city-clerk/public-meetings/agendas-minutes> for a full list of data migration)

CITY COUNCIL	count(*)
City Council	521
STANDING COMMITTEE	count(*)
Economic Development	131
Education	15
Finance	61
Joint	10
Municipal and Legislative Operations	16
Municipal Operations	53
Public Health and Human Services	72
Public Safety	42
Public Service and Transportation	40
Public Works	127
Rules and Legislative Affairs	14
Traffic and Parking	133

Urban Technologies, Innovation and Environment	8
Veterans' and Military Affairs	15
Veterans' Memorials, Parks and Recreation	5
Youth, Parks and Recreation	31
BOARD AND COMMISSION	count(*)
Accessibility Advisory Commission	55
Board of Election Commissioners	91
Board of Health	61
Cable Television Advisory Committee	11
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Commission for the Preservation of Historic Artifacts, Relics and Military Memorials	1
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Planning Board	126
Status of Women Advisory Committee	58
Trust Funds Commission	13
Worcester Arts Council	90
Worcester Ballpark Commission	1
Worcester Public Library Board	44
Worcester Redevelopment Authority	69
Zoning Board of Appeals	112
Public Schools and Committees	100

## **Comparative Criteria**

### **Minimum Evaluation Criteria**

All proposals received by the city will first be reviewed to determine whether the Proposal meets all minimum criteria identified in the RFP.

For a proposal to meet all minimum criteria, a vendor must unconditionally be able to support all requirements in the minimum requirements section. Minimum evaluation criteria reflect those standards or attributes that the city considers essential to the performance of the contract. A vendor that does not meet the minimum criteria will be rated “non-responsive” and will be rejected.

### **Comparative Evaluation Criteria**

Each proposal meeting the Minimum Evaluation Criteria shall be further evaluated and rated according to the Comparative Evaluation Criteria in order to determine the relative merits of each proposal. The review will cover the objectives listed below. Within each category, the degree to which the proposal satisfies the stated objective shall be reviewed and rated on a system of “Highly Advantageous,” “Advantageous,” and “Not Advantageous.”

#### *Proposal Criteria*

**Highly Advantageous:** The proposal is well-written in clear, concise language. Materials are organized and easy to navigate. As a whole, the proposal provides a complete response to this RFP and provides multiple examples of past successes implementing similar solutions.

**Advantageous:** The proposal is clear and well-organized. It provides a complete response to this RFP and includes examples of past successes.

**Not Advantageous:** The proposal does not address all aspects of the RFP. It is poorly written and/or difficult to read. It does not provide adequate information to evaluate the vendor’s ability to successfully meet the City’s goals.

#### *Organization Profile and Past Projects*

**Highly Advantageous:** The team includes members with extensive backgrounds in implementing agenda management software for a municipal organization of similar size. Five (5) references from similar projects consistently rate services and results as “excellent”. The examples of past work you provide are highly relevant to this project and highlight your firm’s competency in advising the city on implementing a cloud and enterprise oriented legislation management program that is easy to expand.

**Advantageous:** The team includes members with backgrounds in implementing a cloud based and an enterprise oriented agenda management software. Three (3) references from similar projects rate

services and results as “excellent”. The examples of past work you provide are somewhat relevant to this project and demonstrate your firm’s experience in advising the city on implementing a cloud based and an enterprise oriented legislation management program that is easy to expand.

**Not Advantageous:** The team does not include members with experience in a cloud based and/or an enterprise oriented agenda management software. No references from similar projects rate services, results, and collaborative process as “excellent”. The examples of past work you provide are not relevant to this project and do not demonstrate sufficient experience in advising the city on implementing a cloud based and/or an enterprise oriented legislation management program that is easy to expand.

#### *Vendor Demonstration (if needed)*

**Highly Advantageous:** Presenters are well-organized and provide a clear, concise presentation. The presentation demonstrates strong insight into the City’s requirements, as described in the RFP. Technical staff are included in the demonstration, and all questions posed by the City were specifically addressed.

**Advantageous:** Presenters are organized. Presentation demonstrates understanding of the City’s requirements, as described in the RFP.

**Not Advantageous:** Presenters are not organized and/or provide an unclear presentation. Presentation demonstrates little understanding into the City’s requirements, as described in the RFP.

#### **Response to Scope of Work**

##### *Meeting Agenda Management with Indexed Video Repository*

**Highly Advantageous:** The proposed solution clearly and succinctly outlines the features of its agenda management software (e.g.: Submission of Agenda items for a Meeting, Workflow, Document Management, Publishing and Linking of Video to the Dockets, Searching etc.) with graphical details and specificity. It includes customization of legislation process details, milestones and a timeline for implementation.

**Advantageous:** The proposed solution lists the features of its agenda management software for the City in general terms without diagrams or examples. It includes milestones and a timeline for implementation.

**Not Advantageous:** The proposed solution has a vague list of its agenda management software features. No graphical or functional specificity is listed or described. No milestones or timeline for implementation are included.

### *Level of Support, Customization and Accessibility*

**Highly Advantageous:** The proposed support plan is very detailed and clear. It ensures comprehensive customer service, as defined by: (1) holistic assessment of City's current state, skills and staffing level (2) future implementation of the Vendor's recommended improvements with regards to policy, process and tools. Implementation will include, but not be limited to: discovery, data normalization, reconciliation, entitlement optimization, service process improvement, and risk mitigation planning, etc. Overall, the proposed plan provides a timely and effective response to meet the City's level of need as illustrated by the RFP. The solution also clearly details communications between the Vendor and the City - both in terms of technical help and in assigning a dedicated representative who will be well-versed in the big picture.

**Advantageous:** The proposed support plan is moderately detailed. It ensures good customer service, as defined by: (1) holistic assessment of City's current state and (2) future implementation of the Vendor's recommended improvements with regards to policy, process and tools. Implementation may include: discovery, data normalization, reconciliation, entitlement optimization, service process improvement, and risk mitigation planning, etc. Overall, it provides a response that meets the City's level of need as illustrated by the RFP. It describes communications between the Vendor and the City in general terms, without or with few specifics on communication processes or dedicated staff.

**Not Advantageous:** The proposed support plan is unclear on the support and accessibility provided. It lacks specificity, detail and is overly general rather than tailoring to the City's needs and environment.

### *Experience in historical data and video repository migration*

**Highly Advantageous:** The proposed solution clearly demonstrates and describes capability and experience in migrating historical data, attributes and video repository into the new cloud based solution. Examples and Description of Migration Plan are attached.

**Advantageous:** The vendor describes or provides general tools and techniques for migrating historical data, attributes and video repository into the new cloud based solution. Examples of tools and process are provided.

**Not Advantageous:** The proposed solution does not describe capability and experience in migrating historical data, attributes and video repository into the new cloud based solution. No tools or techniques are described. Examples and Description of Migration Plan are not included.

### *Experience in implementing agenda management software for a municipality*

**Highly Advantageous:** The vendor has prior experience implementing a cloud based agenda management software solution for a municipality.

**Advantageous:** The vendor has prior experience implementing cloud based software solutions for a municipality.

**Not Advantageous:** The vendor does not have any prior experience implementing cloud based software solutions for a municipality.

#### *Integration with Current Agenda Management Software*

**Highly Advantageous:** The proposed agenda management software has built in capability to integrate with our current agenda management software seamlessly.

**Advantageous:** The proposed agenda management software has limited capability to integrate with our current agenda management software seamlessly.

**Not Advantageous:** The proposed agenda management software has no capability to integrate with our current agenda management software seamlessly.

#### *Integration with other enterprise source systems*

**Highly Advantageous:** The vendor articulates how the proposed agenda management software has built in capability to integrate with seamlessly using standard methods.

**Advantageous:** The proposed agenda management software has very limited features to integrate with other source systems and customized technical components needs to be built. Significant cost would be incurred to accomplish custom enhancements.

**Not Advantageous:** The proposed agenda management software cannot integrate with other source systems using standard methods. No workarounds or customization is possible.

#### *Cloud Environment*

**Highly Advantageous:** The proposed agenda management software will be offered as SaaS (Software as a Service) which is completely managed by the vendor.

**Advantageous:** The proposed agenda management software will be offered as SaaS (Software as a Service) which is not managed by the vendor.

**Not Advantageous:** The proposed agenda management software is hosted on premises of the client with some or no cloud components.



**Price Proposal Sheet - RFP #: 7676-1-W2, Software – Agenda Management / City**

**Proposer Name:** \_\_\_\_\_

**Contact Person:** \_\_\_\_\_

**Email Address:** \_\_\_\_\_

	CATEGORY	DESCRIPTION	PRICE
1	<b>Software Licensing</b>	Pricing must include: (i) count of instances allowed within the enterprise, (ii) named users, and (iii) number of concurrent users	\$
2	<b>Hosting Services</b>	Fixed price for yearly hosting, updates, and backup services	\$
3	<b>Customization Services</b>	Professional services must include: workflow and related functions as currently used and implemented in our existing platform (Home Grown Program / Laserfiche)	\$
4	<b>Data Migration Services</b>	Professional services must include: price for migration of historical data and video repository (January 1998 to current) from our existing platform (Home Grown Program / Laserfiche)	\$
5A	<b>Software Maintenance</b>	Software maintenance and support pricing for year 1 (one).	\$

5B*	<b>Software Maintenance</b>	Out year maintenance and support costs must be clearly delineated for years 2 to 5 (two to five).	\$
6	<b>Training/Standard Implementation</b>	Platform Training must include: (i) number of students, (ii) number of days or hours of training, (iii) number of classes and topics to be covered. The City's preference is using our on-site facility for training. If appropriate for the number of employees to be trained, the City may consider a "train-the-trainer" approach to reduce training costs.	\$
7	<b>Agenda Automation</b>	Costs associated with creating the vendors automated solution for agenda management software.	
8	<b>Meeting Management (City Council, Standing Committee, Board and Commissions)</b>	Costs associated with managing meetings, including in-meeting functions, including but not limited to member voting. Should also include costs associated with managing Standing Committee and Board and Commission meetings.	
9	<b>Notification Processes and General Community Engagement</b>	Process for engaging community members through public notices and tracking of constituent items through pending lists	
10	<b>Open API</b>	Costs associated with implementing open API functions within the agenda management solution.	
11	<b>Video Streaming Services</b>	Costs associated with streaming videos, as well as any necessary hardware to do so (i.e. four encoders)	\$

**TOTAL COST (1 TO 11 EXCLUDING 5B) \*-----\$\_\_\_\_\_\*\***

**\*\*Low proposal price to be based on this total amount**

- **Proposers shall include pricing for each of the items listed above.**