



Request for Qualifications

Agenda Management Software

Submission Deadline:
Thursday, June 18 – 5:00pm EST

Bedford County
122 E. Main Street
Bedford, VA 24523
319-743-6327

OVERVIEW

Bedford County is seeking proposals for agenda management software. The primary emphasis of this project is for agenda preparation for use at Board of Supervisors meetings. It will also have an application for other public meetings.

It is anticipated that the software will streamline the agenda building process, adopt a consolidated agenda management solution, reduce paper processes, automate the agenda management process, establish consistency in board packet documentation, provide the capability of posting the agenda and associated documentation to the County's website, and provide the public the ability to view all the documents being provided to the Board of Supervisors.

Bedford County is interested in selecting a vendor who provides quality services and support. The focus of the vendor should be customer satisfaction through consistent quality of all services provided. Vendors should demonstrate a commitment to continuous improvement of their product and services. A complete list of functionality and requirements are described in the "Project Scope and Requirements" section.

CONTACT INFORMATION

The vendor's principal contact with the County will be Brigitte Lockett:

Bedford County
122 E. Main Street
Bedford, VA 24523
540-586-7601 x 1395
bluckett@bedfordcountyva.gov

SCHEDULE OF ACTIVITIES

Request for Qualifications posted	May 22
RFQ Questions Accepted*	May 22– June 1
Submission Deadline	June 18 –5:00p.m EST
Review of Proposals by Committee	June 2020
Top vendors invited for virtual interviews/demos	July 2020

*All questions received with their answers will be added to the County’s website as they come in.

AGENDA AND BOARD PACKET OVERVIEW

Currently, the agenda and corresponding packet materials are prepared within the County Administration Department for all Board of Supervisors meetings. This is currently a time-intensive and manual process. Each department directly sends documentation to whomever needs to provide approval and then it is sent to the County Administrator for final approval. The resolution numbers, corrections, and document conversions are all then done manually within the County Administration Department. PDFs of each individual document are merged into one to create the final agenda packet. This is posted on the County website, emailed out to the Board of Supervisors and the media. Hard copies are also provided for members who prefer that format.

During meetings the motions, votes, and notes are recorded by hand. There is currently no electronic method for recording votes. Minutes are drafted after the meeting in a word document.

Video of the meetings is currently being recorded by a third party and available on the County’s YouTube channel. There are areas for improvement associated with the video streaming component and it is a future goal to integrate the video streaming into an agenda management software for a more comprehensive solution to the overall agenda process.

WEBSITE INTEGRATION

The County has contracted with Granicus (Vision Internet) for its website and is found at www.bedfordcountyva.gov. It is anticipated the website will be redesigned with the same vendor within the next year. The website serves as a tool for search, retrieval and sharing of information that is of interest to citizens and visitors.

The vendor is responsible for verification of all website features and functionality if they will be specifying a system that is dependent on a specific feature of the County's current website environment.

Any automated agenda management application must integrate with the website features and functionality.

PROPOSAL INFORMATION

Vendors should completely read the requirements and description of this proposal. All inquiries concerning this RFQ should be submitted in writing via email to Brigitte Lockett at bluckett@bedfordcountyva.gov

Proposals must be received by 5:00 p.m. EST on Thursday, June 18, 2020. These should be submitted electronically to bluckett@bedfordcountyva.gov. Late proposals or proposals delivered elsewhere will not be considered.

All proposal information should be contained in the material submitted. Oral presentations will not be permitted. However, equipment and demonstrations will be required from select vendors after the initial evaluation process in order to clarify operating characteristics or to acquaint the County with system features prior to final selection.

Proposal Clarification Questions

After reviewing all proposals received in response to this RFQ, Bedford County may develop a list of clarification questions to be addressed by the vendor. The County will send these questions to the vendor for clarification. The vendor shall provide a response within five (5) working days following receipt of the inquiry.

Evaluation Criteria

This RFQ is not meant to favor any vendor or manufacturer. Instead, it is designed to meet the needs of Bedford County. The proposals will be evaluated based on the Vendor's references, qualifications, technical merit, and cost.

In awarding the contract, Bedford County may take into consideration the Vendor's skill, facilities, capacity, experience, responsibility, previous work record, financial standing, the necessity of prompt and efficient completion of work described in the proposal documents or other factors the County considers relevant. Inability of Vendor to meet these conditions may be cause for rejection of the proposal.

The County is seeking a total solution that addresses the needs outlined in this RFQ. Vendors may not respond "a la carte" to items identified in this proposal. Vendors may partner with other vendors to achieve the total solution requested. Only one vendor must be identified as the proposing vendor for this proposal.

Acceptance

The County reserves the right to accept or reject any or all proposals and waive formalities or irregularities in the process. A proposal, once submitted, shall be deemed final and binding on the Vendor, and shall constitute an option with Bedford County to enter into contract upon the terms set forth in the proposal. All proposals must be valid for 60 days from proposal due date.

Format of Response

In order to simplify the review process and to obtain the maximum degree of comparability, the proposal shall include the following items and be organized in the manner specified on the following pages.

- A. Letter of Transmittal
A letter of transmittal briefly outlining the Vendor's understanding of the work shall be submitted. The transmittal letter should also include general information regarding the firm and individuals involved.

- B. Profile of the Firm/Certification (Form A)
The profile will contain general information regarding the vendor as well as a signature certifying the response to the RFQ.

- C. References (Form B)
To be a qualified proposer, the vendor must include three (3) references with similar systems installed in your proposal response. Preference will be given to vendors with references for implementations at organizations most similar to Bedford County. References will be contacted. Please verify information before submitting.

- D. Project Scope and Requirements (Form C)
Vendor must reply to all features outlined with an appropriate response indicating whether your applications support (Y) or does not support (N) the desired feature or other responses as indicated. Applications which are included in the proposal must be demonstrated on a production basis.

- E. Terms and Conditions (Form D)

G. Costs (Form E)

A cost breakdown of all components of the installation including software, hardware, equipment, training, hosting, initial loading assistance, transportation, and installation shall be a separate section of the proposal. Individual components and line item pricing are to be included here. Version numbers, if applicable, must be included.

FORM A – Profile of Firm/Certification

Company Name:	
Legal Name (if different):	
Years in Business:	
Years installing systems similar to this proposal:	
Number of customers using proposed software:	
Contact Person:	
Full Mailing Address:	
Telephone Number:	
Fax Number:	
Email Address:	
Website:	
Number of Full-Time Employees:	
Number of Technical/Support Personnel:	
Does your company anticipate any mergers, transfer of ownership, management reorganization, or departure of key personnel within the next twelve (12) months that may affect the organizations ability to carry out its proposal?	
Is your company authorized to do business in Virginia?	

The undersigned certifies he/she is authorized to obligate the represented firm and further agrees with all terms, conditions, and requirements of Bedford County’s Request for Proposal. Further, the undersigned certifies that information provided in the Request for Proposal is true and correct.

Name: _____

Signature: _____

Title: _____

Date: _____

FORM B – References

To be a qualified proposer, the vendor must include three (3) references with similar systems installed in your proposal response. Preference will be given to vendors with references for implementations at organizations most similar to Bedford County. References will be contacted. Please verify information before submitting.

Reference 1

Organization Name:	
Address:	
Type of Business:	
Contact Person:	
Telephone Number:	
Date of Installation:	
Description of System:	

Reference 2

Organization Name:	
Address:	
Type of Business:	
Contact Person:	
Telephone Number:	
Date of Installation:	
Description of System:	

Reference 3

Organization Name:	
Address:	
Type of Business:	
Contact Person:	
Telephone Number:	
Date of Installation:	
Description of System:	

FORM C – Project Scope and Requirements

Reply to all features outlined with an appropriate response using the following key: F=Fully provided out of the box, CO = Provided through configuration, Mod= Provided through a technical modification of the software, TP = Third party software required, NA = Not available, RT = Provided through a reporting tool

Req #	Requirement	Response - use code from key. Do not type additional comments.
1. Agenda Preparation		
1.0	Secure login available allowing login for department and division access by those given these rights?	
2.0	Ability to grant login overrides for substitute approvers?	
3.0	Support for multiple meeting types?	
3.1	Indicate Number Supported.	
4.0	Agenda preparation follows a client-defined workflow?	
4.1	Indicate Number of workflows Supported.	
5.0	Agenda preparation allows for future redesigns of workflow?	
6.0	Document tracking/history beginning to end in real time?	
7.0	Automatically renumber agenda items when editing?	
8.0	Easily track the whereabouts of every agenda item in the routing process?	
9.0	Move and copy agenda items from one meeting to another?	
10.0	Interdepartmental staff assignment?	
10.1	Multiple interdepartmental staff assignments?	
11.0	Clerk is centralized administrator (edit rights granted to others?)	
12.0	Supports multiple file formats (Word, PDF, Excel, GIS, AutoCAD, etc.)?)	
12.1	List formats.	
13.0	Email notifications to staff?	
13.1	Beginning to end of process?	
13.2	Interdepartmental approvers?	
13.3	Deadline alarm?	
13.4	Returned for Edit/Correction?	
13.5	Final approval?	
13.6	Are notifications customizable by client?	
Provide clarification if needed for any of the above responses. Limit your response to no more than 350 words:		

Req #	Requirement	Response - use code from key. Do not type additional comments here.
2. Agenda Creation		
1.0	Amount of end users and/or licenses (indicate numbers supported)	
2.0	Agenda can be edited at any point in the workflow?	
3.0	Clerk is centralized administrator (edit rights granted to others?)	
4.0	Access for staff and Board Members with secure login?	
5.0	Export or automatically push finalized agendas to County's website?	
6.0	Delayed Public Notification?	
7.0	Export or automatic push to email distribution lists?	
Provide clarification if needed for any of the above responses. Limit your response to no more than 350 words:		

Req #	Requirement	Response - use code from key. Do not type additional comments here.
3. Board Packet/Agenda Item Cover Sheet		
1.0	Is uniform information/cover sheet automatically created for each agenda item?	
2.0	Support for multiple cover sheet types?	
2.1	Indicate number of cover sheet types supported.	
3.0	Can Agenda Item Cover Sheet be customized by client?	
4.0	Can the fields be customized by client?	
5.0	Depending on what is entered into the fields, can that determine approval workflow?	
Provide clarification if needed for any of the above responses. Limit your response to no more than 350 words:		

Req #	Requirement	Response - use code from key. Do not type additional comments here.
4. Meeting Minutes		
1.0	Record Roll-Call Votes?	
2.0	Record Real-Time Notes?	
2.1	Can notes be accessed based on security rights?	
3.0	Are minutes auto-created?	
4.0	Can minutes be edited?	
5.0	Export or automatic push to County's website?	
Provide clarification if needed for any of the above responses. Limit your response to no more than 350 words:		

Req #	Requirement	Response - use code from key. Do not type additional comments here.
5. Audio/Visual		
1.0	Can audio/video be linked to minutes and/or agenda? (i.e. clicking on an item will jump to a specific spot in audio/video)?	
2.0	Export or automatic push to County's website?	
3.0	Please provide a short description of your solution's audio and video streaming capabilities. Do you have preferred collaborative partnerships with any particular audio and/or video streaming vendors? If so, who?	
Provide clarification if needed for any of the above responses. Limit your response to no more than 350 words:		

For the following set of questions, please provide an answer to each and limit your responses to no more than 500 words per question.

6. Additional Items	
1.0	<p>Bedford County does not currently have a document retention solution. As a potential future consideration, please provide a short description of your solution's archiving capabilities and what file storage systems it is compatible with. Which components can be integrated? Do you have preferred collaborative partnerships with any particular document retention companies? If so, who?</p>
2.0	<p>How can our current website be utilized to link or display meeting information?</p>

3.0	During meetings, what capabilities are offered for attendees to follow along? (i.e can they see what agenda item is being discussed, votes on the screen, etc.)
4.0	During meetings, what capabilities are offered so board members can easily follow along? (jump to council packet item, see what agenda item is being discussed, etc.)
5.0	During meetings, what capabilities are offered so citizens not in attendance can follow the meeting?

6.0	Please identify the exact tasks that the County must perform and/or be responsible for in order to accomplish the delivery and installation of the system, if any. (Attach separate document labeled "Required Pre-Delivery and Installation Tasks" if needed.) This may include, but not be limited to server operating system, software, client hardware, etc.
7.0	Please provide information regarding access to any web-based searchable knowledge base for questions and answers.
8.0	Please provide the support process and support response times after the implementation of the agenda management solution.

9.0	The software support contract must provide software updates to keep the software current. Please provide a written copy of support contracts and pricing of maintenance options. (Attach separate document labeled "Support Contract".)
10.0	Please indicate what, if any, requirements for remote support are needed.
11.0	Please describe initial end-user training options that are available and include costs for such in the cost section (found later in this document).

12.0	Please describe any follow-up end-user training options available and include costs for such in the cost section (found later in this document).
13.0	Please describe administrator training options available and include the costs in the cost section of the proposal (found later in this document).
14.0	Please explain how retention is configured and if it can be dependent on document or meeting type.

15.0	Please describe storage capacity and include costs associated with storage growth in the costs section of the proposal (found later in this document).
16.0	If contract is terminated, how does the County get its data from your system/software?
17.0	Do you have preferred or collaborative partnerships with audio/visual vendors?

18.0

What sets you apart from other agenda management software vendors?

FORM D – Terms and Conditions

Vendor must comply with the following terms and conditions.

Overall System Requirements

All proposed hardware and services must be demonstrable at the time of proposal submission and must be in production. Maintenance and support must be provided as part of the proposal. All items submitted in the proposal must be fully supported by the manufacturer/vendor. The selected vendor will be required to assume all responsibility for delivery, installation, testing of all hardware and support services offered in their proposal whether or not the vendor is the producer or manufacturer.

No “beta” products shall be proposed for this project.

Unless otherwise specified, hardware must be new items, in good condition, fit for the purpose for which they are being acquired and free from defects. In addition to price, quality and suitability to Bedford County’s use will be the first consideration.

Delivery lead times, service, performance record, manufacturer’s warranties and the value of the overall award will also be taken into consideration when awarding this contract.

Any material, equipment, service or work ordered, which in the opinion of the County, does not completely fulfill the specifications, must be removed and be replaced immediately with the material, equipment, services or work that fulfills the specifications or sample quality at no additional expense to the County.

Contract Duration and Price Changes

The County is seeking a multi-year contract for software, hardware, training, implementation and support for Agenda Management Software. At no point will pricing for the original purchase be allowed to rise above stated contract. Additional services may be added during this time for an additional cost.

Installation and Delivery

All equipment shall be delivered to its proper location. During the time between delivery and acceptance, Bedford County cannot be held liable for any damages to or theft of any components. It will therefore be the responsibility of the Vendor to obtain insurance against loss, theft and damage during shipment.

Returns

The County reserves the right to return any shipment if, in our opinion, the products supplied to not conform to the specifications of this contract.

Confidentiality of Information

Any submitted information considered trade secret or confidential to the vendor, or rendered via a non-disclosure agreement with the County, must be so labeled.

The Vendor, the County, and their agents will hold the submitted proposal and any related materials in confidence if so requested by the Vendor. Throughout the evaluation process, any information therein will not be made available to any other party unless required by Virginia State Code. No debriefings or scoring sheets will be released before final recommendation. However, after the award, all contents of the selected proposal will be considered public

All proposal material supplied, including supporting material and information disclosed during the proposal evaluation process, will become the property of the County and will be retained for internal use. Submission of a proposal indicates acceptance by the proposer of the conditions contained in this request for proposal, unless clearly and specifically noted in the proposal submitted and confirmed in the contract between the County and the vendor selected.

Incurring Costs

The County is not liable for any costs incurred with replying to this RFQ.

Caution to Vendors

The County is not responsible for locating or securing any information which is not identified in the RFQ and reasonably available to the County. Vendors are encouraged to ask questions to clarify items in this RFQ that may need clarification.

Contract Negotiations

The County reserves the right to negotiate a contract after the successful vendor is selected. Selection will be based on the proposal and subsequent interviews, if any; therefore, proposals must be complete.

Contract Documents

The vendor's response to this RFQ, response to questions and written addenda will become part of the contractual documents upon signing of contract documents. The order of precedence shall be signed contract, response to follow-up questions, and response to the RFQ. The most recently dated response to an item will supersede other items referencing the same topic.

Payment Terms and Retainage

Vendor must be able to offer all devices specified on a multi-year agreement to be paid annually or monthly. Payment terms must be no less than Net 30. Vendor must provide samples of Reports and Invoices.

Initial Loading

The selected vendor must agree to provide qualified systems staff to assist in the initial installation and configuration of the system. The selected vendor should provide a complete, written implementation plan and schedule of work to be done prior to commencing any installation of hardware or software.

Training

The selected vendor must provide on-site or web-based training of end-users and administrators. Training must be provided for all application modules included in the vendor’s response to this RFQ. Vendors must include all expenses including travel expenses for trainers in the “Costs” section.

Support

The County requires application, billing and account support be available from the vendor. Vendor must be able to assign a dedicated account representative with support specifically to the County and handle account management issues.

Support must be minimally available Monday through Friday, 8:00 a.m. – 5:00 p.m. EST with options stated for “after hours support.” It is desired that any user have access to support personnel for questions.

Acceptance:

Name: _____

Signature: _____

Title: _____

Date: _____

FORM E – Costs

A cost breakdown of all components of the implementation including software, training, hosting, initial loading assistance, transportation and installation shall be provided. Individual components and line item pricing are to be included here.

*For item 1, please provide breakout of each item within the total base cost. You can include this on an additional page.

Item #	Description	Total Amount
1.0	Total base cost to provide, install, and deploy proposed system (including travel, project management, training, and first year support and maintenance)*	
2.0	Annual Support and Maintenance/Subscription	
2.1	Year 1	
2.2	Subsequent Years	
3.0	Provide any additional costs associated with the performance of services outlined in this RFQ (including additional modifications or modules, follow-up training, storage growth, hardware, etc.) – if applicable.	
4.0	Other recurring costs, if applicable (including annual license fees, hosting, etc.)	

Costs shall be fully burdened to include all applicable overhead and profit, lodging, meals, and transportation.

Name: _____

Signature: _____

Title: _____

Date: _____