FORM A: PROPOSAL
(See B8)

1. Contract Title

FOR CONTENT MANAGEMENT AND AGENDA MANAGEMENT SOFTWARE TO REPLACE THE CITY'S REPORT INFORMATION SYSTEM (RIS) AND DECISION MAKING INFORMATION SYSTEM (DMIS)

2. Bidder

_____
Name of Bidder

_____
Usual Business Name of Bidder as it appears on Invoice (if different from above)

_____
Street

_____
City   Province   Postal Code

(Mailing address if different)

_____
Email Address of Bidder

_____
Facsimile Number

_____
Street or P.O. Box

_____
City   Province   Postal Code

_____
GST Registration Number (if applicable)

(Choose one)

The Bidder is:

☐ a sole proprietor

☐ a partnership

☐ a corporation

carrying on business under the above name.

3. Contact Person

The Bidder hereby authorizes the following contact person to represent the Bidder for purposes of the Proposal.

_____
Contact Person   Title

_____
Telephone Number   Facsimile Number

4. Definitions

All capitalized terms used in the Contract shall have the meanings ascribed to them in the General Conditions and D3.1.

5. Offer

The Bidder hereby offers to perform the Work in accordance with the Contract for the price(s), in Canadian funds, set out on Form B: Prices, appended hereto.

6. Execution of Contract

The Bidder agrees to execute and return the Contract no later than seven (7) Calendar Days after receipt of the Contract, in the manner specified in C4.3.01.

7. Commencement of the Work

The Bidder agrees that no Work shall commence until he/she is in receipt of a notice of award from the Award Authority authorizing the commencement of the Work.

8. Contract

The Bidder agrees that the Request for Proposal in its entirety shall be deemed to be incorporated in and to form a part of this offer notwithstanding that not all parts thereof are necessarily attached to or accompany this Proposal.

9. Addenda

The Bidder certifies that the following addenda have been received and agrees that they shall be deemed to form a part of the Contract:

No. _____ Dated _____

_____ _____

_____ _____

10. Time

This offer shall be open for acceptance, binding and irrevocable for a period of ninety (90) Calendar Days following the Submission Deadline.

11. Signatures

In witness whereof the Bidder or the Bidder's authorized official or officials have signed this

_____ day of _____ , 20_____ .

Signature of Bidder or
Bidder's Authorized Official or Officials

_____

_____
(Print here name and official capacity of individual whose signature appears above)

_____

_____
(Print here name and official capacity of individual whose signature appears above)

FORM B: PRICES
(See B9)
FOR CONTENT MANAGEMENT AND AGENDA MANAGEMENT SOFTWARE TO REPLACE THE CITY'S REPORT INFORMATION SYSTEM (RIS) AND DECISION MAKING INFORMATION SYSTEM (DMIS)

UNIT PRICES

ITEM NO.	DESCRIPTION	SPEC. REF.	UNIT	APPROX. QUANTITY	UNIT PRICE
1.	Total costs to the City to perform the Work of the Contract not including Live/On Demand Video Streaming and hosting	Form N	Lump Sum	1	
2.	Annual maintenance/licensing fees for Item 1	Form N	Per year	2	_____Per year
3.	Any other items/options proposed beyond the City's stated requirements.		Lump Sum	1	
4.	Hours Required by City to complete the Work		Hour	_____	**50.00/hour**
5.	Optional Live/On Demand Video Streaming and hosting solution		Lump Sum	1	
6.	Annual maintenance/licensing fees for Item 5		Per Year	2	_____Per year

FORM N: QUESTIONNAIRE – SOLUTIONS ALTERNATIVES

RIS & DECISION INFORMATION MAKING SYSTEM

Instructions for filling out Form N: Questionnaire

1 **Complete Form N: Questionnaire.**

2 **Ensure that you indicate which alternative is being Proposed in the Maintenance Section.**

3 **Follow the instructions shown below that apply to the alternative being Proposed.**

Solution Alternative 1 - A commercial off-the-shelf software package with customization

1 **For each requirement, place an X in one (1) of the boxes that best describes your solution:**
Fully Available: Solution for the requirement is currently available in the existing product 'out of the box'.
Partly Available: Solution for the requirement is partly available in the existing product, but will be modified to fully meet the requirement.

3rd Party Supplied: Requirement is expected to be met by using a 3rd party vendor's existing product, either integrated or non-integrated.

Will Build: Will build a component to meet the requirement.
Not Possible: Requirement cannot be met by the vendor.

2 **For each requirement, in the 'Describe Approach...' box, describe in one or two sentences the approach that will be taken to provide a solution to that requirement. Description shall highlight how the solution to the requirement will be approached technically, and where it will fit into the existing product and shall be included on Form B: Prices.**

3 **For each System Integration and Subsystem Integration requirement, describe in one or two sentences the approach that will be taken to provide a solution to that requirement, as follows:**
(a)   If integrated, the bidder shall indicate how the integration will be accomplished
(b)   If replaced by custom built software, the bidder shall indicate how it will be achieved
(c)   If replaced by an existing component, the bidder shall describe the component and how it replaces the satellite system.

Solution Alternative 2 - A custom built software package

1 **For each requirement, place an X in one (1) of the boxes that best describes your solution:**
Fully Available: Solution for the requirement has been built in the past by the personnel that will be assigned to this project
Partly Available: Solution for requirements similar but not the same as the specified requirement has been built in the past by the personnel that will be assigned to this project

3rd Party Supplied: Requirement is expected to be met by using a 3rd party vendor's existing product, either integrated or non-integrated.

Will Build: Will build a component to meet the requirement. Nothing similar has been built in the past by the personnel that will be assigned to this project

Not Possible: Requirement cannot be met by the vendor.

2 **For each requirement, in the 'Describe Approach...' box, describe in one or two sentences the approach that will be taken to provide a solution to that requirement. Description shall highlight how the solution to the requirement will be approached technically, and it's similarity with previous work done by the personnel and shall be included on Form B: Prices.**

3 **For each System Integration and Subsystem Integration requirement, describe in one or two sentences the approach that will be taken to provide a solution to that requirement, as follows:**
(a)   If integrated, the bidder shall indicate how the integration will be accomplished
(b)   If replaced by custom built software, the bidder shall indicate how it will be achieved
(c)   If replaced by an existing component, the bidder shall describe the component and how it replaces the satellite system.

FORM N: QUESTIONNAIRE – SOLUTIONS ALTERNATIVES

Solution Alternative 3 - Software as a Service (SAAS)

1   **For each requirement, place an X in one (1) of the boxes that best describes your solution:**
Fully Available: Solution for the requirement is currently available in the existing product 'out of the box'.
Partly Available: Solution for the requirement is partly available in the existing product, but will be modified to fully meet the requirement.

3rd Party Supplied: Requirement is expected to be met by using a 3rd party vendor's existing product, either integrated or non-integrated.

Will Build: Will build a component to meet the requirement.

Not Possible: Requirement cannot be met by the vendor.

2   **For each requirement, in the 'Describe Approach...' box, describe in one or two sentences the approach that will be taken to provide a solution to that requirement. Description shall highlight how the solution to the requirement will be approached technically, and where it will fit into the existing product and shall be included on Form B: Prices.**

3   **For each System Integration and Subsystem Integration requirement, describe in one or two sentences the approach that will be taken to provide a solution to that requirement, as follows:**

(a)   If integrated, the bidder shall indicate how the integration will be accomplished

(b)   If replaced by custom built software, the bidder shall indicate how it will be achieved

(c)   If replaced by an existing component, the bidder shall describe the component and how it replaces the satellite system.

FORM N: QUESTIONNAIRE

MAINTENANCE SECTION	
Indicate the Alternative that this response applies to (check one only)	**Check One**
Solution Alternative 1 - A commercial off-the-shelf software package	
Solution Alternative 2 - Software as a Service (SAAS)	
Solution Alternative 3 - A custom built software package	

Enter description of maintenance and licensing after implementation below, pursuant to B9 and B12. of the RFP.
Bidder Response

FORM N: QUESTIONNAIRE REQUIREMENT ANALYSIS RESPONSES							
GOODS		Currently Available	Partly Available	3rd Party Supplied	Will Build	Not Possible	**Describe approach or available feature**
	The Bidder shall supply a System in accordance with the requirements hereinafter specified.						
RC	**REPORT CREATION**						
RC01	Shall allow users to create and store various types of reports directly in a centralized system						
RC02	Shall create versions of each instance of a report with timestamp and user information						
RC03	Shall always display the most current version, while allowing users to access past versions						
RC04	Should allow users to create, store and use Report templates directly in the system						
RC05	Shall allow users to attach any format of supporting documentation to a report						
RC06	Shall allow users to view report with consolidated attachments with the additional option to view report & attachments separately						
RC07	Shall allow users to flag reports as 'Regular' or 'Major, Sensitive or Complex'						
RC08	Shall allow users to flag reports as In-Camera						
RC09	Shall allow users to have visibility to all flags (In-Camera, Regular/Complex, and Time Sensitive) throughout the system						

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	and the report's lifecycle						
RC10	Should allow users to have and track online discussions during Report Review / Approval process						
RC11	Shall allow users to flag reports as Time Sensitive						
RC12	Should allow users to electronically determine estimated timelines for a report						
CC	**CONSULTATION AND CONCURRENCE**						
CC01	Should allow users to collaborate with other departments for the creation of a report, prior to it being submitted for approval, through an automated workflow						
CC02	Should allow users to flag a report that requires or has received consultation and/or concurrence from another department						
CC03	Should allow users to append the report with consultation/concurrence information, comments or results						
RA	**REPORT APPROVAL**						
RA01	Shall allow Administrative users to create & manage various report approval workflows						
RA02	Shall automatically apply approval workflows when reports are submitted						
RA03	Shall allow users to identify & manage the Critical Path						

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RA04	Should allow users to track the status of a report at any point in the approval process						
RA05	Should allow users to identify reports that they are tracking						
RA06	Shall not allow changes to be made to a report once it has received a final approval						
RA07	Shall allow approvers to approve, decline, release, refer reports back and/or add comments						
RS	**REPORT STATUS**						
RS01	Should automatically update Reports' status once Agenda is published						
RS02	Should automatically update status of a report upon Disposition of Items Publication						
AC	**AGENDA CREATION**						
AC01	Should allow users to create, store & use custom created Agenda templates directly in the system						
AC02	Shall automatically create the Table of Contents for an Agenda						
AC03	Shall allow users to create automated, electronic Agendas						
AC04	Should allow users to use the Agenda Creation functionality for Informal Meetings						
AC05	Reports used in Agenda Items shall be links/views of source report document						
AC06	Shall allow users to attach any format of supporting documentation to an Agenda						

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AC07	Shall use system validation to only allow In-Camera reports and items to be published on an In-Camera Agenda						
AC08	Should allow users to create an Agenda from a previous Committee Minutes document						
AP	**AGENDA PUBLICATION**						
AP01	Shall allow department users to publish the Agenda within the system, without a manually- created Index document						
AP02	Shall allow department users to preview an Agenda prior to Publication						
AP03	Shall allow department users to publish an Agenda as Private or Public						
AD	**ADDENDUM CREATION**						
AD01	Shall allow users to create an Addendum to a published Agenda						
AD02	Shall identify which sections / items were modified since the Agenda was last published						
VA	**VIEW AGENDAS**						
VA01	Shall allow department users to quickly and easily navigate the Agenda						
VA02	Shall allow department users to have multiple instances of an Agenda or multiple agendas open at one time						
VA03	Should allow department users to annotate Agendas						

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MC	**MINUTES CREATION**						
MC01	Shall allow users to create Minutes from previous Agendas and Publish the Minutes document						
MC02	Shall allow department users to Adopt / Lock Minutes						
DC	**DISPOSITION CREATION**						
DC01	Shall allow department users to identify decisions made						
DC02	Shall automatically create the Disposition of Items document						
AT	**ACTION ITEMS TRACKING**						
AT01	Shall allow department users to create and assign Action Items, using an automated workflow						
AT02	Shall allow to include details in an Action Item						
AT03	Shall allow to track Action items						
AT04	Shall allow to create a follow-up report from within an Action item						
DA	**DELEGATION OF AUTHORITY**						

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DA01	Should allow users to create, store, and use Delegation of Authority items in an electronic system						
DA02	Should allow users to reference the Delegation of Authority Index during Report Creation						
PI	**CITY DEPARTMENT IMPLEMENTATION PROCESS**						
PI02	Should allow users to Publish By-Laws and Policies						
PI03	Should allow Review and Update the current By-Law categories						
PI04	Should eliminate traditional style of letter communication and replace with automated notification when By-Law database is updated						
PH	**PUBLIC HEARING PROCESS**						
PH01	Shall allow users to store and manage Zoning Reports and Orders within the system						
PH02	Shall allow users to store and manage exhibits within the system						
HI	**ITEM HISTORY**						
HI01	Shall allow users to view complete history of any item						
HI02	Shall allow users to visually see the linkages/relationships between items						

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NO	**AUTOMATIC NOTIFICATIONS**						
NO01	Shall allow users to create and manage any automated notifications that are required						
NO02	Shall allow users to subscribe to notifications through RSS feeds or similar methodology						
SE	**SEARCH FUNCTIONALITY**						
SE01	Shall allow users to Search on all document contents, including attachments						
SE02	Shall allow users to Search by multiple methods						
SE03	Shall allow users to sort/filter/group search results						
SE04	Shall Return all matches for a search						
CS	**SCHEDULE OF COUNCIL AND COMMITTEE MEETINGS**						
CS01	Should allow users to create Council and Committee Meetings up to a year in advance						
CS02	Should allow users to update the Council and Committee Meeting Calendar						
CS03	Should provide the same features as the current version of the Council and Committee Schedule						

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CS04	Should automatically send out initial meeting requests and notifications of changes						
CS05	Should allow the Calendar Module to be used by other groups across the organization						
NF	**NON-FUNCTIONAL REQUIREMENTS**						
NF01	Shall allow Administrative users to create, manage and implement a complex permissions structure						
NF02	Should Increase visibility to permission levels						
NF03	Should Expand current levels of permissions for more read-only access						
NF04	Shall be available, in its entirety, from an iPad						
NF05	Should be available, in a Viewing (Read-Only) capacity from the majority of mobile devices						
NF06	Shall allow external users to access publicly published information						
NF07	Shall allow all users to gain access through any existing browser types and any internet connection						
NF08	Should allow internal users to access the system through Single Sign On methodologies						

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NF09	Should have static links to any item within the system						
NF11	Shall allow users to migrate all current and past data in a consistent and time-efficient manner						
NF12	Shall meet all requirements in by-law 86/2010 surrounding records management http://winnipeg.ca/CLKDMIS/DocExt/ViewDoc.asp?DocumentTypeId=1andDocId=5220andDocType=O						
NF13	Shall allow all Minutes & By-Laws to be stored and maintained permanently						
NF14	Shall allow both novice and experienced users to navigate the system quickly and easily						
NF15	Shall Present all data in an intuitive and user-friendly way						
NF16	Should Use hover over tool tips, common/standardized icons or text labels						
NF17	Shall Integrate with key existing systems, if necessary						
NF18	Shall Allow an API interface to include customizations						
NF19	Shall be available to users 24/7/365 with minimal to no down-time						
NF20	Shall provide quick response and processing times for all functions						

FORM N: QUESTIONNAIRE

SUPPORT		Currently Available	Partly Available	3rd Party Supplied	Will Build	Not Possible	Describe approach or available feature
	Further to D11 the Contractor must provide a toll free phone number for users to obtain help and system use instructions on an 8 A.M. to 5 P.M basis.						
	Further to D11, the Contractor must provide the City support for the System and a single point of contact for reporting service problems.						

OPTIONAL

VA	AUDIO AND VIDEO RECORDING CREATION AND PUBLICATION	Currently Available	Partly Available	3rd Party Supplied	Will Build	Not Possible	Describe approach or available feature
VA01	Should allow users to access live streaming video of Council meetings from a desktop or mobile device						
VA02	Should allow users to access video and audio recordings of all meetings						
VA03	Should Integrate video and/or audio Hansard with Minutes and index them to Minutes item						