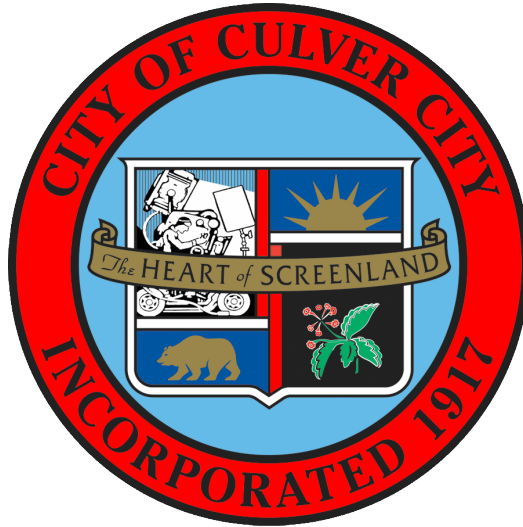




REQUEST FOR PROPOSALS

for

ELECTRONIC DOCUMENT MANAGEMENT SYSTEM

RFP #1622

DECEMBER 2016

City of Culver City

INFORMATION TECHNOLOGY

9770 Culver Boulevard

Culver City, CA 90232-0507

PROPOSALS DUE: February 2, 2017

ELECTRONIC DOCUMENT MANAGEMENT SYSTEM

RFP #1622

I. REQUEST SUMMARY

The City of Culver City is seeking proposals from firms to provide comprehensive planning, development, data conversion, implementation and support of an Electronic Content/Document Management System (ECMS) solution. In addition, the vendor must offer a robust ECMS that replaces the City's current SIRE FileCenter, SIRE Capture, and Microsoft SharePoint 2010 systems. The City desires a single vendor for all services identified in the Request for Proposal (RFP). However, the City will consider alternates such as a prime vendor subcontractor for the conversion process. The selected firm will be responsible for providing services in accordance with the scope of services outlined in the proposal.

As a minimum, the vendor's services shall include the following:

- Design and configuration
- Interfaces to City data/systems
- Implementation consulting
- Training
- Content migration/conversion
- Documentation
- Project management
- Reporting
- Implementation on the City's IT infrastructure and standards
- Ongoing maintenance and operations support

II. INTRODUCTION

A. Community Profile

The City of Culver City (City) is a charter city incorporated in 1917. The City is governed by a five-member City Council whose members are elected at large and operates under a Council/City Manager form of government.

Culver City is a full-service city located in the western area of Los Angeles County, generally situated north of Los Angeles International Airport, southeast of Santa Monica, south of Beverly Hills and southwest of West Hollywood. The City is approximately five square miles with a residential population of approximately 40,000. The total adopted budget for FY 2016-17 is approximately \$238 million, of which \$112 million is General Fund.

B. Background

In May 2005, the City of Culver City began using SIRE Technologies' content/document management solution (ECMS). SIRE Technologies ECMS solution is currently being used primarily in the City Clerk's Office, Human Resources Department and the Community Development Department. There are multiple cabinets and types of documents and each has specific requirements for indexing, security, confidentiality, and functionality. The City also used the Sire Agenda Management module but as of June 2015 transitioned to using Granicus for agenda and meeting management. The City also utilizes Microsoft SharePoint 2010 as a document management repository. This is used city-wide by all departments. The documents stored in SharePoint are not indexed but will also need to be migrated to the selected ECMS solution.

In August 2012, SIRE Technologies was purchased by Hyland Solutions. Hyland Solutions has elected to support the SIRE product indefinitely, but will not actively develop, deploy or enhance the SIRE platform going forward. The City, therefore, wishes to investigate alternatives in the marketplace.

C. General RFP Submittal Information

The City's designated staff will evaluate proposals received.

During the review process, the City reserves the right, where it may serve the City's best interest, to request additional information or clarification from those that submit proposals, or allow clarifications, corrections of errors, or omissions. Any and all changes in the RFP will be made by written addendum, which shall be issued by the City to all prospective bidders who have registered for the RFP via the City's website.

The City reserves the right to retain all proposals submitted. Submission of a proposal indicates the Proposer's acceptance of the conditions contained in this RFP, unless clearly and specifically noted in the proposal submitted and confirmed in the contract between the City and the Proposer selected.

The preparation of the proposal will be at the total expense of the Proposer. There is no expressed or implied obligation for the City to reimburse responding Proposers for any expense incurred in the preparation of proposals in response to this request. All proposals submitted to the City shall become properties of the City and will not be returned. If any information in your proposal is confidential and/or proprietary, please further submit a separate, redacted copy for servicing public records requests.

The City reserves the right to reject any or all proposals, in whole or part, to waive any informality in any proposal, and to accept the proposal which, in its discretion, is in the best interest of the City. Even though the City intends to only select a single finalist, the City reserves the right to select more than one finalist in the

event that the ECMS Committee is not able to agree on a single vendor. Submittal of a proposal does not guarantee a vendor will be invited to demonstrate nor does it obligate the City to purchase or contract for hardware, software and/or related services either now or in the future.

To be considered, proposers must send one color original, two electronic (searchable PDF copy of entire proposal), and three (3) hard copies of their proposal in a sealed envelope with the name of the company submitting the proposal and the title of "RFP #1622 - Electronic Document Management System" to:

**City of Culver City
City Clerk
9770 Culver Blvd.
Culver City, CA 90232**

For a complete list of the City's RFP submittal terms and conditions, legal statements, and insurance requirements, please refer to "Exhibit A" attached hereto.

D. RFP Questions

Questions with regard to this RFP should be submitted by e-mail to Anissa Di Vincente, Webmaster, at anissa.divincente@culvercity.org by Friday, January 13, 2017. All firms sending questions will receive responses to all questions and any other addenda that may be released, via e-mail by Wednesday, January 18, 2017.

E. Schedule

The City reserves the right to make changes to the below schedule, but plans to adhere to the implementation of this RFP process as follows:

RFP released:	December 21, 2016
Deadline for receiving questions:	January 13, 2017
Response to questions:	January 18, 2017
Proposals due:	February 2, 2017, at 3:00pm (PST)
Finalists selected:	February 10, 2017
Presentations/Interviews (if necessary):	Week of February 20, 2017
Vendor selected:	March 27, 2017

III. SCOPE OF SERVICES

The City of Culver City intends to obtain the services of a qualified organization to provide the services as outlined below. Best industry practices and/or best management practices may require additional services not explicitly enumerated. The proposer should identify any additional services required, price them, and explain them in their response.

A. Project Objectives

The City of Culver City intends to obtain the services of a qualified firm to take full responsibility for implementation and support of the ECMS. The objective of this RFP is to replace our current department-wide Electronic Content/Document Management System (ECMS), SIRE FileCenter 6.6, SIRE Capture, and Microsoft SharePoint 2010. The SIRE system is managed by the City's City Clerk and maintained by the City's IT Department. The Microsoft SharePoint 2010 system is administered and managed by the IT Department.

The goals of implementing a new ECMS include:

- Establish a relationship with a proven ECMS vendor with long-term viability
- Migrate existing documents and records to new ECMS
- Allowing City to continue to use existing scanning hardware
- Maintaining or Improving the user experience
- Maintain functionality & interface to other software applications
- Implementation of an online (public-facing) document portal
- Automate retention policies where appropriate for effective document management
- Incorporate workflow for enhanced document processing
- Non-disruptive implementation with minimal downtime for users
- Extend the standardized use of an ECMS City-wide (scan/capture, index, storage and retrieval of documents)
- Effective training for all City users
- Document security and disaster recovery capabilities
- Compliance with California Government Code and Regulations 22620.1 through 22620.8 associated with Trustworthy Electronic Document or Record Preservation

The scope of the ECMS is citywide. The following provides a listing of current or future software application interfaces:

- Office 365
- Microsoft Office 2013 (Outlook, Word, Excel, Powerpoint, SharePoint)
- Accela Automation
- Granicus Agenda & Record Management
- Tyler Technologies - Munis Financial System

B. Technical Specifications

The Vendor must deliver to the City a new ECMS based on the following requirements.

1. Detailed Specifications

Vendors must provide a detailed response to each of the technical specifications listed in Exhibit B.

2. Software System Licensing

The recommended solution should have the ability to support concurrent users. The City has approximately 750 total network users.

Explain the software licensing model for the proposed solution (concurrent user or named user licensing). The recommended licensing model should support usage for all user types from software administration, scan/capture users, contributors/editors, search/retrieval (read only), etc. Licensing should also include external access for the public facing portal.

3. System Architecture

The City has standardized on a Microsoft Windows environment. Specifically using Windows 7 (64-bit) for desktop operating system with plans to transition to Windows 10. The server environment utilizes Windows Server 2012 R2 on VMware ESX with SAN storage. The standard database is Microsoft SQL 2014.

Provide a detailed description of the system architecture for the proposed solution including the following:

- a. High level diagram of the required hardware architecture
- b. Hardware and software requirements including server operating system, database server, client browsers supported, etc.
- c. List of scanning hardware that is required for the solution
- d. Detail the inherent backup and recovery functionality that is available within the software

4. Implementation and System Configuration

The selected vendor will be responsible for all software installation and configuration for the proposed solution with assistance from the City's Information Technology department. The selected vendor will be responsible for providing all the necessary technical resources required for their product and the City will be responsible for installing operating system, database components and network connectivity. This includes all recommended system environments (development, test, production).

The vendor will be required to completely configure the proposed software components. This includes security integration (with Active Directory/SSO) and system integration with the City's current software applications as detailed in Exhibit B – Technical Specifications.

The selected vendor will be responsible for FULLY testing the product as delivered and installed on the server, along with all testing for the solution and any

associated updates to the server with clear guidance/directions for the City to be able to migrate into production with the assistance of the vendor team.

The vendor/integrator will demonstrate that the installed and configured software meet all functional specifications provided in this document. All user acceptance test plans will be developed by the City to validate each component of the system being installed and configured along with validating all anticipated functionality is performing as anticipated.

These user acceptance test plans will be specific and detailed clearly showing compliance with each requirement contained within this document and the vendor/integrator response and shared with the selected vendor after the vendor's design documentation is approved.

Please provide a high level project implementation plan that identifies high level tasks and the required resources that will be performed by the vendor. Also outline tasks and resources that will be requested of the City. The project plan should take into account the implementation and configuration elements identified above.

5. Conversion/Migration of Existing Content

As previously mentioned, the City currently has files stored in the Sire Document File Center and Microsoft SharePoint 2010. The City desires one solution that will replace both of these file repositories. The following details the current storage for each solution.

Current Repository	Approx. Amount of Storage
Sire File Center	212 GB (27 Cabinets)
SharePoint 2010	1 TB

Describe in detail the recommended migration process for transferring existing document from the current Sire and Microsoft SharePoint environments. Please include in the cost proposal the estimate time and cost to migrate existing content.

6. Education and Training

Training Plan - The vendor/integrator must provide a training plan with the scope and length of proposed training for users and product/hardware support staff. This training must be sufficient to enable the users to become proficient with the system in a short time period. The following topics, at a minimum, need to include:

- System Administration:
Detailed training for assigned the City system administrators and other software support functions are required. This training

should be sufficient enabling the City's support staff to perform all required daily, weekly, monthly, and ad-hoc support activities.

- **Technology Basics:**
These basics should include what ECMS is, how it functions from a user perspective, the various components used, etc.
- **User Controls:**
This portion of the training should include detailed information on user access to each application/function, what each application/function is used for, how to use each application/function, which applications/functions to access in what order, etc.
- **Security Maintenance Training:**
This level of training should include detail associated with how the security models are planned and configured and procedures that should be followed by the City as updates to the security model is required.
- **Error Handling:**
The error-handling portion of the training should include descriptive information as to the various error messages that can be received by the users during daily operation. This training should be sufficient that the user can resolve what was entered incorrectly, performed improperly, or what process needs to be performed.

Please describe in detail how your training will be provided and describe how extensive the user and administrative training will allow rapid system deployment.

Training Costs - Any training costs must be clearly described in the Pricing. Training for the operation of the proposed system shall be included in the response along with any other expenses related to training. It is necessary that all the training be performed on-site.

7. System Maintenance/Support

The vendor/integrator will be required to provide technical support for the installed/configured solution. The City will have primary and backup technical resources responsible for day to day system administration and trouble-shooting with the users.

These technical resources will be trained by the vendor/integrator on all product/solution administrative functions necessary for the City project to be successfully support and maintain after successful deployment into

production. The product/solution related technical training should enable the City staff to manage ongoing workload, be able to identify issues for vendor support resolution, and support end-users using the product/solution

Please describe in detail your technical support hours and service level agreements. Also include support for protocols for any 3rd party vendors that are recommended for the proposed solution.

The vendor/integrator will provide information on the following items:

- Software problem isolation and identification procedures.
- How new software is released and installed.
- If third-party software is used, information describing third-party software support.

IV. PROPOSAL OUTLINE TO BE SUBMITTED

The proposal shall be organized and submitted with the following elements:

A. Cover Page

B. Table of Contents

C. Executive Summary

Provide a brief summary describing the proposer's ability to perform the work requested, a history of the proposer's background and experience providing services, the qualifications of the proposer's personnel to be assigned to this project, any subcontractor, sub consultants, and/or suppliers and a brief history of their background and experience, and any other information called for by this request for proposal which the proposer deems relevant, including restating any exceptions to this request for proposal. This summary should be brief and concise to apprise the reader of the basic services offered, experience and qualifications of the proposer, staff, subcontractors, and/or suppliers.

D. Questionnaire/Response to Scope of Services

Proposer shall provide responses and information to fully satisfy each item in the Questionnaire. Each question item should be presented before the proposer's response.

E. Attachments

V. QUESTIONNAIRE

A. Company and General Information

1. Company name and address.
2. Letter of transmittal signed by an individual authorized to bind the respondent, stating that the respondent has read and will comply with all terms and conditions of the RFP.
3. General information about the primary contact who would be able to answer questions about the proposal. Include name, title, telephone number and email address of the individual.

B. Qualifications and Experience of the Firm

1. Describe your firm's history and organizational structure. Include the size of the firm, location of offices, years in business, organizational chart, name(s) of owner(s) and principal parties, and number and position titles of staff.
2. What is the primary business of the parent company and/or affiliates?
3. Which office(s) of your organization will have primary responsibility for managing this account? List the members of your team who will be responsible for providing the services and for ongoing support.
4. What is your firm's experience conducting the services requested? Describe comparable projects performed by your firm in the last five years, including the number of projects, scope of service, and status of projects.
5. Comment on other areas that may make your firm different from your competitors.

C. Qualifications and Experience of Proposed Project Team

1. Describe the qualifications of staff proposed for the assignment, position(s) in the firm, and types and amount of equivalent experience. Be sure to include any municipal agencies they have worked with in the past three years and their level of involvement. A description of how overall supervision will be provided should be included.
2. Identify and provide the resume(s) of the personnel who will be assigned to this project.

D. Questions/Response to Scope of Services

1. Describe the methods by which your firm will fulfill the services requested in the Scope of Services and subsequent sections. Vendors must provide a detailed response to each of the technical specifications listed in Exhibit B.
2. Provide a statement of the service(s) that differentiate your firm from other respondents.

E. Fees

1. Provide your fees for the proposed services by utilizing Exhibit C – Cost Proposal Template. This should be inclusive of all fees related to the project.

F. References

List the name, address and telephone number of references from at least three (3) recent similar projects. Include a brief description of the work provided for each reference. California municipal or county projects are preferred. You may offer more than three recent similar projects if desired. The references should include the start date of the project and the date of completion for each project.

G. Implementation Schedule

Include a detailed implementation schedule with an estimated project start date of April - May 2017 and anticipates a 2 – 3 month implementation timeframe, or propose an alternative based on vendor's past experience with similar efforts. Note key project milestones and timelines for deliverables. Identify any assumptions used in developing the schedule.

H. Certificate(s) of Insurance

The City will require the successful proposer to provide Certificates of Insurance evidencing required coverage types and the minimum limits. See Exhibit A for more information on the City's insurance requirements.

I. Business Tax Certificate

The proposing organization does not require a Culver City business tax certificate to respond to this RFP. However, the successful proposer will be required to acquire a Culver City Business tax certificate during the contracting process and maintain an active certificate throughout the contracted period.

VI. EVALUATION OF PROPOSALS

Proposals will be judged on the Proposer's ability to provide services that meet the requirements set forth in this document. The City reserves the right to make such investigations as it deems necessary to determine the ability of the Proposer to provide services meeting a satisfactory level of performance in accordance with the City's requirements. Interviews and presentations by one, several, or all of the Proposers may be requested by evaluators if deemed necessary to fully understand and compare the Proposer's capabilities and qualifications. The adequacy, depth, and clarity of the proposal will influence, to a considerable degree, its evaluation.

Proposals will be evaluated on the basis of the following criteria, in no particular order:

- | | |
|--|-------------------|
| 1. Qualifications & Experience | Section IV, B & C |
| 2. Questions/Response to Scope of Svcs | Section IV, D |
| 3. Fees | Section IV, E |
| 4. References, Schedule & Required Forms | Section IV, F – I |

**SUPPLEMENTAL TERMS AND CONDITIONS, LEGAL STATEMENTS,
AND INSURANCE REQUIREMENTS**

SUPPLEMENTAL TERMS AND CONDITIONS

- I. Submission of a proposal shall be deemed a binding offer to enter into a contract with the City. Any proposed modifications to the agreement shall be signed by the successful Proposer and returned, together with the certificate of insurance required pursuant to said Section of the Agreement within ten (10) days after the Notice of Award.
- II. All Proposers shall be presumed to understand all of the terms, conditions and requirements of the agreement as stated in the specifications and to be thoroughly familiar with the project.
- III. The selected Proposer shall be required to obtain all applicable Culver City permits and business licenses. The Business Licensing Division may be reached at (310) 253-5888. The cost of these items shall be included in the total proposal price.
- IV. Any proposal may be withdrawn prior to the RFP opening time provided that the request is in writing and signed by the authorized representative. The withdrawal of a proposal shall not prejudice the right of the Proposer to file a new proposal to the time and date set for the opening of proposals. No proposal received after the time fixed for the RFP opening will be considered.
- V. Subsequent to the RFP opening, a Proposer shall be relieved of a proposal due to mistakes only if the Proposer can establish to the satisfaction of the City that all of the following circumstances exist:
 - a. A mistake was made;
 - b. The Proposer gave the City written notice within five (5) days after the opening of the proposals of the mistake; specifying in the notice, in detail, how the mistake occurred;
 - c. The mistake made the proposal materially different than the Proposer intended it to be;
 - d. The mistake was made filling out the proposal and not due to error in judgment or to carelessness in reviewing the scope of service or specifications as stated in the RFP.
- I. The City reserves the right to seek supplemental information from any proposer at any time between the dates of proposal submission and the RFP award. Such information will be limited to clarification or amplification of questions asked in the

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original proposal. Any proposer may be subject to personal interview and inspection of their business premises prior to award.

- VI. The City reserves the right to reject any or all proposals and to waive informalities and minor irregularities in proposals received and to accept any portion of proposal or all items of proposal if deemed in the best interest of the City. In addition, the City reserves the right to do any, or all, of the following:
- a. Reject any or all proposals or make no award;
 - b. Issue subsequent RFP;
 - c. Cancel the RFP;
 - d. Remedy technical errors in the request for proposals;
 - e. Modify any requirements contained within the RFP and request revised submittals from Proposers determined to be within the competitive range;
 - f. Award a contract to one or more Proposers;
 - g. Accept the written proposal as an offer, without negotiation and issue a notice to proceed, if applicable.
- VII. The City reserves the right to contract with any of the firms responding to this RFP based solely upon its judgment of the qualifications and capabilities of that firm.
- VIII. All materials submitted regarding this RFP become the property of the City. Responses may be reviewed by any person at RFP opening time and thereafter. The City has the right to use any or all collection ideas presented in reply to this request, subject to the limitations outlined in *Proprietary Information* below. Disqualification of a proposer does not eliminate this right.
- a. *Proprietary Information* – Any restrictions on the use of data contained within a proposal must be clearly stated in the proposal itself. Proprietary information submitted in response to this RFP will be handled in accordance with applicable City Procurement Regulations and the California Public Records Act.
- IX. The City is not liable for any cost incurred by proposer prior to issuance of an agreement, contract, or purchase order.

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LEGAL STATEMENTS

All proposers must meet the following contractual and legal requirements in order to enter into a contractual agreement with the City:

I. PROHIBITED INTERESTS

- a. Contractor warrants that it has not employed or retained any company or person, other than a bonafide employee working solely for Contractor, to solicit or secure this contract and that it has not paid or agreed to pay any company or person, other than a bonafide employee working solely for Contractor, any fee, percentage, brokerage fee, gifts or any other consideration, contingent upon or resulting from the award or making of this contract. For violation of this warranty, the City shall have the right to annul this contract without liability;
- b. Contractor agrees that, for the term of this Contract no member, officer, or employee of the City, or of a local public body during his/her employment for one (1) year thereafter, shall have any interest, direct or indirect, in this contract, or to any benefit arising thereof ;
- c. The employment by Contractor of personnel on the City's payroll will not be permitted in the execution of this contract, even though such employment may be outside of the employee's regular working hours or on Saturdays, holidays, or vacation time; further, the employment by the Contractor of personnel who have been on the City's payroll within one (1) year prior to the date of contract award, where such employment is caused by and/or dependent upon Contractor securing this or related contract with the City, is also prohibited.

II. ANTI-LOBBYING PROVISION

- a. During the period between proposal submission date and the contract award, proposers, including their agents and representatives, shall not directly discuss or promote their proposal with any member of the City of Culver City City Council or City staff except in the course of City-Sponsored inquiries, briefings, interviews, or presentations, unless requested by the City;
- a. This provision is not meant to preclude offerors from discussing other matters with City Council members or City staff. This policy is intended to

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create a level playing field for all potential offerors, assure that contract decisions are made in public, and to protect the integrity of the RFP / Bid Evaluation process. Violation of this provision may result in rejection of the offeror's proposal.

- III. **NON-DISCRIMINATION REQUIREMENTS:** In addition to any other obligations set forth in the specifications, Contractor shall not discriminate against any employee or applicant for employment because of gender, gender identity, gender expression, sexual orientation, sex, age, disability, medical condition, genetic information, marital status, race, color, religion, ancestry, or national origin. Contractor shall take affirmative action to ensure that employees are treated during employment without regard to their gender, gender identity, gender expression, sexual orientation sex, age, disability, medical condition, genetic information, marital status, race, color, religion, ancestry, or national origin. Such affirmative action shall include, but not be limited to, the advertising, layoff or termination, rates of pay or other forms of compensation, and selection for training, including apprenticeship. Contractor shall post in a conspicuous place available to all employees and applicants for employment notices setting forth the provisions of this fair employment practices paragraph.
- IV. **COMPLIANCE WITH LAW:** The Contractor shall familiarize itself with and perform the service required under this contract in conformity with requirements and standards of the City, municipal and public agencies, public and private utilities, special districts, and railroad agencies whose facilities and services may be affected by service under this contract. The Contractor shall also comply with all Federal, OSHA, state, and local laws and ordinances applicable to any of the service involved in this Contract. The Contractor shall indemnify and save harmless the City against any claim arising from the violation of any such laws, ordinances and regulations whether by the Contractor or his employees.
- V. **PROTECTION OF RESIDENT WORKERS:** Protection of Resident Workers: The City of Culver City actively supports the Immigration and Nationality Act (INA) which includes provisions addressing employment eligibility, employment verification, and nondiscrimination. Under the INA, employers may hire only persons who may legally work in the United States (i.e., citizens and nationals of the U.S.) and aliens authorized to work in the U.S. The employer must verify the identity and employment eligibility of anyone to be hired, which includes completing the Employment Eligibility Verification Form (I-9). The Contractor shall establish appropriate procedures and controls so no services or products under the Contract

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Documents will be performed or manufactured by any worker who is not legally eligible to perform such services or employment.

- VI. INDEMNIFICATION / HOLD HARMLESS CLAUSE. To the fullest extent permitted by law, Contractor shall indemnify, defend (at Contractor's sole expense, with legal counsel approved by City) and hold harmless the City of Culver City, members of its City Council, its boards and commissions, officers, agents, and employees (hereinafter, "Indemnitees"), from and against all loss, damage, cost, expense, liability, claims, demands, suits, attorneys' fees and judgments arising from or in any manner connected to Contractor's or its employees or agent's acts, errors or omissions related to this Contract. This indemnification includes, but is not limited to, tort liability to a third person for bodily injury and property damage.

Notwithstanding the foregoing, nothing herein shall be construed to require Contractor to indemnify an Indemnatee from any claim arising from the sole negligence or willful misconduct of that Indemnatee.

The duty to defend referenced herein is wholly independent from the duty to indemnify, arises upon written notice by City to Contractor of a claim within the potential scope of this indemnification provision, and exists regardless of any determination of the ultimate liability of Contractor, City or any Indemnatee.

INSURANCE REQUIREMENTS

All Proposers must meet the following insurance requirements in order to enter into a contractual agreement with the City:

- I. Contractor shall submit duly executed certificates of insurance, with declarations page and endorsement list, which shall be provided to the City through the department administering the contract, and approved by the City Attorney, for the following:
 - a. An occurrence based Commercial General Liability ("CGL") policy, at least as broad as ISO Form CG 0001, in the minimum amount of One Million Dollars (\$1,000,000) each occurrence, with not less than Two Million Dollars (\$2,000,000) in annual aggregate coverage.

The CGL Policy shall have the following requirements:

 1. The policy shall provide coverage for personal injury, bodily injury, death, accident and property damage and advertising injury, as those terms are understood in the context of a CGL policy. The

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coverage shall not be excess or contributing with respect to City's self-insurance or any pooled risk arrangements;

2. The policy shall provide \$1,000,000 combined single limit coverage for owned, hired and non-owned automobile liability;
 3. The policy shall include coverage for liability undertaken by contract covering, to the maximum extent permitted by law, Contractor's obligation to indemnify the Indemnitees as required under the Indemnity provisions of the Contract;
 4. The Policy shall not exclude coverage for Completed Operations or Hazards; and
 5. **The Culver City, members of its City Council, its boards and commissions, officers, agents, and employees will be named as an additional insured** in an endorsement to the policy.
- b. Business Automobile Liability Insurance coverage in the amount of One Million Dollars (\$1,000,000), providing coverage for use of mobile equipment (i.e. heavy mobile equipment or vehicles primarily for use in an off-road environment), to the extent that (1) such mobile equipment will be used within the City limits or on City business, and (2) coverage for mobile equipment is not otherwise covered by the CGL policy listed in subparagraph (a), above.
- c. Professional/Negligent Acts, Errors and Omissions Insurance (where applicable) in the minimum amount of One Million Dollars (\$1,000,000) per claim, and shall include coverage for separate "personal injury" alleged to have been committed in the course of rendering professional services, unless such coverage is provided by the CGL policy listed above.
- d. If the Agreement will have Contractor employees working within the City limits, Contractor shall maintain Workers' Compensation Insurance (Statutory Limits) and Employer's Liability Insurance (with limits of at least one million dollars [\$1,000,000] per accident.) Contractor shall submit to City, along with the certificate of insurance, a Waiver of Subrogation endorsement in favor of City, its officers, agents, employees and volunteers.

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II. WAIVER BY THE CITY: The City may waive one or more of the coverages listed in Section I above. This waiver must be express and in writing, and will only be made upon a showing by the Contractor that its operations in and with respect to City are not such as to impose liability within the scope of that particular coverage.

III. ADDITIONAL INSURANCE REQUIREMENTS:

- a. All insurance listed in Paragraph A shall be issued by companies licensed to do business in the State of California, with a claims paying ability rating of "BBB" or better by S&P (and the equivalent by any other Rating Agency) and a rating of A-VII or better in the current Best's Insurance Reports;
- b. Contractor shall provide City with at least thirty (30) days prior written notice of any modification, reduction or cancellation of any of the Policies required in Paragraph A, or a minimum of ten (10) days' notice for cancellation due to non-payment;
- c. The City may increase the scope or dollar amount of coverage required under any of the policies described above, or may require different or additional coverages, upon prior written notice Contractor.
- d. If your insurance carrier charges an additional fee, you must include that amount in your project costs.

EXHIBIT B – Technical Specifications

For each requirement listed below, insert the most appropriate response code that matches the software capabilities and proposed implementation scope using the table below.

Response	Definition
Y	Provided with standard functionality that is available within the proposed solution (no custom development required)
C	Customization/Software Enhancement. The functionality is not inherent in the system but can be achieved with software customization
V	3 rd Party Vendor. The functionality is not available within the software solution but can be achieved with a 3 rd party vendor supplied module. <i>Include in the comments section the name of the software module and name of supplying vendor.</i>
N	Functionality is not included in this proposal

Item #	Description	Response (Y/C/V/N)	Comments
1.0	User Application Interface		
1.1	Application interfaces allows up to 750 users to access information managed by the ECM system in an easy to use manner.		
1.2	The ability to easily locate and retrieve scanned or “digitally born” documents regardless of location		
1.3	Ability to use keyword search for any document stored and managed by the system		
1.4	Support document check-in and check-out functionality and version control for revision tracking and/or rollback		
1.5	Ability to link selected documents into a virtual group and treat resulting documents as a single entity		
1.6	Support multiple users working on documents collaboratively		
1.7	Support bar code recognition for indexing		
1.8	Provide online context sensitive help		
1.9	Annotate documents without changing the underlying file including redaction without altering original document		

EXHIBIT B – Technical Specifications

Item #	Description	Response (Y/C/V/N)	Comments
1.10	Capability to insert electronic stamps, highlights, and sticky notes without altering original document		
1.11	Support viewing of annotations separately from document if desired		
1.12	Ability to enable or disable the printing of annotations on the document		
1.13	Ability to E-mail a link to the document and as an attachment		
1.14	Ability to handle storage of large volumes of content with growth rates of 10% or more per year		
1.15	Ability to maintain metadata on file folders and documents		
1.16	Ability to assign various security on what functions a user can perform on a document (read, write, create, delete, etc.)		
1.17	Maintain detailed audit trail. Includes user ID, time, date, access, and action		
1.18	Maintain detailed security audit trail reports, including reporting of all user requests beyond assigned security rights		
1.19	Audit trail reports available on demand to users with appropriate security access		
1.20	Ability to limit document and folder access to authorized users (Document is not visible to unauthorized users)		
1.21	Support central (administrative) security with secondary security functions that are administered at the department level (e.g., department managers may assign access roles to select members of their departments)		
1.22	Ability to define default levels of security (e.g., group, department, folder, file, role based, etc.) for all document types		

EXHIBIT B – Technical Specifications

Item #	Description	Response (Y/C/V/N)	Comments
1.23	Ability for users to define content permission types for the type of tasks that can be performed on their personally authored documents.		
1.24	Ability to store documents of various types in a non-proprietary format		
1.25	Ability to store documents of any file size (No inherent file size limitations other than physical disk space)		
1.26	Implement retention policies based on several variables including document type with the ability to override based on user entered criteria.		
1.27	For retention purposes, ensure that at least 2 copies of the document must be created meeting all of the conditions of a trusted system as identified by the State of California.		
1.28	When a document is copied for retention, ensure that the original electronic document format is maintained in the system until the retention policy dictates removal.		
1.29	Ability for users to easily identify document versions and review notes or comments associated with each version		
1.30	Ability to automatically generate PDF or PDF/A documents with appropriate digital signatures for finalized or approved documents		
1.31	Ability for users to login to the system using Windows Authentication (Active Directory) with Single Sign-on (SSO)		
1.32	Enable document security that supports users being able to add layers of markups and annotations		
1.33	Capability to restrict certain classes of documents from being saved to media outside of the ECM including email, print, and/or fax		
1.34	Ability to print document in document viewer		

EXHIBIT B – Technical Specifications

Item #	Description	Response (Y/C/V/N)	Comments
1.35	Ability to print one or multiple documents from search list without viewing		
1.36	Ability to print one or multiple documents from a previously saved search		
1.37	Ability for users to select both inbound and/or outbound emails for storage into the ECM system		
1.38	Ability to have a public facing portal and easily set which document and folder are able to be accessed publically.		
1.39	Ability to easily design and create web forms with data collection, routing and approval.		
1.40	Support use on remote devices including iOS, Android, and Windows platforms for both the internal and the public facing portal		
2.0	Workflow		
2.1	Workflow routing configuration based on graphical user interface, which can be used for simple workflow and the ability to create advanced workflows with additional scripting/programming.		
2.2	Ability to design and implement workflow strategies in which documents can be routed and visually tracked by other users		
2.3	Ability to handle parallel routing		
2.4	Provide ability to obtain status reports on routed content for route status and notification purposes via E-mail		
2.5	Ability to route multiple documents as one set (e.g., case files)		
2.6	Ability to save and select user-defined workflow templates		

EXHIBIT B – Technical Specifications

Item #	Description	Response (Y/C/V/N)	Comments
2.7	Capability to provide email notifications informing users when items are due or about to expire		
2.8	Automatically escalate and report bottlenecks within workflow routing		
2.9	Ability to establish alternative workflow routing (manually or automatically)		
2.10	Ability to redirect workflow routing if a user is on an extended leave from the office		
2.11	Support workflow routing exceptions to a predefined workflow if the user has security approval		
2.12	Support user-defined E-mail notifications to the user when documents have been routed, approved, modified, etc.		
2.13	Support electronic signatures		
3.0	Index and Searching		
3.1	Ability to create default index and search templates for predetermined document profiles		
3.2	Ability to create and maintain user-defined document profiles to meet departmental requirements		
3.3	Capability to print the search results		
3.4	Ability to create and save search queries for individual user reuse		
3.5	Ability to create and save search queries for global usage provided the user has security access to the requested documents		
3.6	Support searching across single or multiple content repositories		
3.7	Ability to define and use custom search fields based on individual departmental preferences.		

EXHIBIT B – Technical Specifications

Item #	Description	Response (Y/C/V/N)	Comments
3.8	Support advanced search techniques including but not limited to Boolean, wild card, date range, and text proximity searches.		
3.9	Ability to refine searches by modifying a current search without reentering information.		
3.10	Support full-text searching – Ability to perform a query on documents using both text search, meta-data and index field values simultaneously		
4.0	Document Capture		
4.1	Ability to perform the following document import methodologies: A) Direct scanning methodologies (batch scan, index scan, and sequential scan of single document) B) Direct loading of existing electronic document		
4.2	Ability to support dual-sided scanning		
4.3	Support automatic sensing of the document orientation during scanning		
4.4	Capability to perform OCR/ICR and full-text indexing		
4.5	Allow the user to choose which pages of a document to OCR/ICR and/or index		
4.6	Ability to edit OCR/ICR text		
4.7	Provide user with quality control functionality during capture process		
4.8	Ability to index documents with a bar code.		
4.9	Ability to preset common fields for indexing purposes		
4.10	Ability to add attachments from emails (Office365, Outlook 2013) directly into the system and have indexed based on document type.		

EXHIBIT B – Technical Specifications

Item #	Description	Response (Y/C/V/N)	Comments
4.11	Ability to add document from One Drive directly into the system and have indexed based on document type.		
4.12	Ability to add emails into the system directly from Office365 and Outlook 2013.		
4.13	Ability for when a document is scanned, to ensure that the electronic document is considered a true accurate copy of the original information.		
5.0	Application Integrations Provide system integration with the following:		Detail Proposed Functionality
5.1	Accela Automation (Permit/Land Use Modules)		
5.2	Microsoft Office 365		
5.3	Microsoft Office 2013		
5.4	Tyler Technologies - Munis Finance System		
5.5	ESRI GIS		
5.6	Granicus Agenda Management Suite		

EXHIBIT C – Cost Proposal Template

Please detail pricing for the following components and functionality:

Description of Software and/or Services	Price Proposal
ECMS Software and Licensing <i>List all modules (with associated pricing for each module) required for an enterprise solution meeting the requirements outlined in response to the RFP</i>	
Capture software licensing per scanning station <i>List any additional software licensing that is required for scanning documents including OCR/ICR functionality</i>	
Professional Services for Installation and Configuration <i>Include all professional services required to install, configure, test and cut-over to production the proposed solution</i>	
Professional Services for Data Migration <i>Please include all professional services cost related to migrating the City's existing data repositories as identified in the RFP</i>	
System Integration <i>Detail all costs (including software licensing and professional services) that will be required to integrate the proposed solution to the applications detailed in Exhibit B Technical Specifications.</i>	

Description of Software and/or Services	Price Proposal
Technical and End-User Training <i>Detail the training cost per day and provide a description of training provided – list course titles if applicable</i>	
Customized Software Enhancements <i>If a response code “C” was entered in Exhibit B Technical Requirements and there are additional costs to satisfy the technical requirement, please list below the item number and the associated costs</i>	
3rd Party Vendor Solutions <i>If a response code “V” was entered in Exhibit B Technical Requirements and there are additional costs to satisfy the technical requirement, please list below the item number and the associated costs</i>	
Annual Maintenance Fees <i>Please include one year of annual maintenance for the solution that will be effective for 12 months commencing after implementation of the system</i>	
Other Costs <i>Please include any other costs not previously identified above that will be required for the proposed solution</i>	
TOTAL PROPOSAL COSTS	\$