**Appendix 1: Application Template to Request for Proposals (RFP) (RFP# 140) Contract Lifecycle Management System (CLMS)**

1. **Cover Page**

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| **Service Component** | Contract Lifecycle Management System |

* 1. Applicant Information

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| **Application Type**  (select one) | Sole Applicant (one organization applying to provide a Contract Lifecycle Management System)  Subcontract (one lead organization with approved subcontractor) |

**Lead Organization**

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| --- | --- | --- | --- | --- | --- |
| **Organization Name** |  | **City Supplier #** |  | **Federal ID #** |  |
| **Address** |  | | | | |
| **Director Name** |  | **Director Phone** |  | **Director Email** |  |
| **Point of Contact** |  | **Point of Contact Phone** |  | **Point of Contact Email** |  |
| **Subcontractor Name (if applicable)** |  | **Subcontractor**  **Address (if applicable)** |  | | |

* 1. Certifications

I understand that the City reserves the right to modify agreement requirements at the time of funding and/or during the agreement negotiations; that an agreement may be negotiated for a portion of the amount requested; that funding sources are subject to change; and that there is no agreement until a written grant/contract has been signed by both parties and approved by all applicable City agencies.

In accordance with Administrative Code Chapter 12X, I certify that my company is headquartered at the address indicated above. I will notify the City if my company's headquarters moves.

The signatory below is a person authorized to obligate the Applicant to perform the commitments contained in the RFP and application. Submission of this document will constitute a representation by the above organization(s) that they are willing and able to perform the commitments and requirements contained in the RFP and application.

Signature of authorized representative(s):

**Name:**       **Title:**

**Signature:**       **Date:**

**Name:**       **Title:**

**Signature:**       **Date:**

1. **Minimum Qualifications**

Proposers must demonstrate that they meet all of the Minimum Qualifications (MQs):

* 1. Applicant must be a certified vendor with the City and County of San Francisco or have the ability to become a certified vendor within ten (10) days after notice of intent to award.
  2. Applicant must have experience within the past five years of successfully building at least one solution similar in scope and complexity to the one described in this RFP within a managed time frame. Applicant should describe at the minimum:
* The project name
* Project scope summary
* Dates when project was performed
* Project costs
* Roles and responsibilities
* Milestones & Deliverables
* Performance on delivering the project on schedule and budget
* The client name
* A client contact for reference
  1. Applicant must demonstrate a minimum of three (3) years of experience in delivering services using the Agile Framework
  2. Applicant must fully complete the CLMS Requirements Workbook (Attachment 7). Please refer to **Section IIIB – Scope of Work, Functional Areas** of the RFP for instructions. **Please complete all tabs and respond to each requirement. Applicant should attach the completed workbook to their application.**
  3. Provide at least three written references – current and/or former

**Please use the table below to specify how the Applicant meets the Minimum Qualifications listed above. Please add tables as needed.**

|  |  |
| --- | --- |
| Prior or Current Project Name |  |
| Client Name |  |
| Client Contact Name |  |
| Client Contact Title |  |
| Client Contact Email Address |  |
| Start and End Dates of Services |  |
| Briefly describe how Applicant meets this Minimum Qualification: |  |

If any part of the service will be through a subcontract, Applicants must indicate as such and describe in the box below the plan to successfully deliver the services in this Request for Proposal. **Please add boxes as needed.**

**Plan for Subcontracting (if applicable)**

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1. **Relevant Experience (6 pages maximum for responses to this section)**
2. Applicants must name and describe in detail up to three (3) successful implementations (including scope of implementation) using the applicant’s solution/system to public or private customers of a similar complexity as HSH.

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1. **Proposed Solution (7 pages maximum for responses to this section)**

4.1 Applicant must describe the system it proposes to deliver and implement as requested in this RFP. Applicant’s response and CLMS Requirements Workbook will be evaluated and responses must include the following:

1. A clear description of the proposed system to replace the current system for HSH as described in this RFP
2. A clear description of how the applicants proposed solution meets and/or exceeds the defined needs of HSH with respect to the scope of work contained in this RFP. Applicant should describe any innovative, creative, and effective solutions, methods and/or approaches they wish for HSH to consider in fulfilling requirements.
3. An articulated strategy and collaborative plan to work with HSH regarding system configuration/development, maintenance, and support.

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1. **Project Approach (7 pages maximum for responses to this section)**

5.1 Applicants must describe their project plan and schedule for completing each major task and subtask listed under the Section IIID - Scope of Work,

Overview of Project Tasks of this RFP. The plan must demonstrate in detail how applicant will complete each major task and meet all HSH’s

requirements.

Applicant must also describe any training and assistance that accompanies the system:

1. For System Administrators
2. Training for Users

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1. **Organizational Capacity, and Staffing**

6.1 Applicant must demonstrate that it has the organizational capacity, infrastructure and staffing structure needed to provide the proposed services

including supervision and management.

1. Attach resumes of key project staff and clearly identify which staff position they occupy, what their role in the RFP scope of work will be and provide written assurance that the key individuals listed and identified will be performing the work and will not be substitutes with other personnel or reassigned to another project without the City’s prior approval.
2. Identification of a qualified lead professional responsible for the project and identification of the professional(s) who will be performing the day-to-day work, including Project Manager, Technical/Product Lead, Account Manager, and any other lead roles.
3. Identification of any sub-consultants who will be involved. If sub-consultants are proposed, describe the work they will perform and how they are qualified to perform it.

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1. **Fiscal Capacity - Budget**

7.1 All costs to the City shall be included in the payment entered on the Appendix 2: Price Proposal Template.

1. A not-to-exceed total budget amount
2. A total budget amount for the project that does not exceed $1,000,000
3. A total budget amount for Maintenance and Operations. Maintenance and Operations budget must include System Maintenance, Technical Support, Hosting Services, and License Support. Please refer to Section IIIE, Scope of Work – Overview of Maintenance and Operations Tasks of the RFP for more information on Maintenance and Operations tasks.
4. HSH would like proposals that build creative solutions to minimize these costs. Please include:

* A proposed plan for Maintenance and Operations support, including addressing troubleshooting requests post-project on the Appendix 1: Application template (in the box provided below)
* Costs for any additional services on the Appendix 2: Price Proposal Template and a description of what the additional services entail (in the box provided below)

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**8. Oral Presentation/Interview**

#### 8.1 Up to three (3) of the highest scoring applicants will be invited to provide a demo of the proposed solution. The applicants should demonstrate the

#### feasibility of their solution and explain how the HSH needs and requirements will be fulfilled. Applicant is expected to present at scheduled meetings

#### that are anticipated to last at least one to three days of demonstrations. **No response is required for this section. HSH will reach out to highest scoring**

#### **applicants with proposed dates and evaluation criteria regarding oral presentations.**