



## REQUEST FOR PROPOSALS (RFP)

# AGENDA MANAGEMENT SOFTWARE

**Issue Date:** April 9, 2025

**Proposal Due Date:** April 30, 2025, by 4:00 pm

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## DESCRIPTION

The Town of Rolesville is seeking proposals from qualified vendors to provide an agenda management software solution. The Town Clerk and Executive Leadership Team will use this software to create, manage, and distribute meeting agendas and minutes efficiently. The system must provide transparency by making agenda-related information readily accessible to the public while ensuring seamless collaboration among staff members.

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## BACKGROUND

The Town of Rolesville, North Carolina, is a rapidly growing municipality located in northeastern Wake County within the Raleigh metropolitan area. The Town operates under a council-manager form of government, with a Mayor and five Board of Commissioners. The Town Clerk is responsible for agenda preparation, minute-taking, and records management for public meetings. The Town seeks to implement a modern, cloud-based management solution to enhance efficiency and transparency. The solution should be integrated with MS Office Suite and the website [www.rolesvillenc.gov](http://www.rolesvillenc.gov).

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## SCOPE OF SERVICES

The Town requires an agenda management software solution that includes, but is not limited to, the following features:

### **Core System Capabilities:**



1. **Agenda Creation & Management:** Build, edit, and distribute meeting agendas with customizable templates. Compile agenda packets of hundreds of pages including maps.
2. **Minutes Preparation & Management:** Tools to facilitate real-time notetaking, tracking of actions, and automated minute generation.
3. **Public Portal Access:** A user-friendly interface for public viewing of agendas, minutes, and supporting documents.
4. **Workflow & Approval Process:** Customizable workflow for staff reviews and approval of agenda items.
5. **Searchable Document Repository:** Archiving and full-text search functionality for historical agendas and minutes.
6. **Integration Capabilities:** Compatibility with Microsoft Office, PDF formats, and video streaming services.
7. **Security & Compliance:** Compliance with public records laws, role-based access controls, and secure cloud storage.
8. **Mobile Accessibility:** Responsive design for access via desktop, tablet, and mobile devices.
9. **Voting & Action Tracking:** Electronic voting functionality with automatic action item tracking and reporting.
10. **Support a minimum of 5 Boards:** Board of Commissioners, Planning Board, Parks and Recreation Advisory Board, Board of Adjustment, and Tree Board
11. **Permit the use of and/or attachments:** Word, Excel, Publisher and PDF format documents
12. **Allow for live streaming of meetings:** Bookmark video to the appropriate section of the agenda and playback video.
13. **Creates a presentation:** (i.e. PowerPoint slides) to display on the audience screens in the chamber during meetings.
14. **Voice recognition during recordings:** Voice recognition capabilities for up to 20 or more people speaking during board meeting recordings.

### Implementation & Support Services:

1. **Data Migration & System Setup:** Assistance with transferring existing agenda and minutes data into the new system.
2. **Training & User Support:** Initial training for Town staff and ongoing customer support.
3. **System Updates & Maintenance:** Regular software updates to enhance functionality and security.



## **PROPOSAL REQUIREMENTS**

Vendors must submit a proposal that includes the following:

### **A) Letter of Intent**

1. Signed by an authorized officer of the company.
2. Company name, address, and contact details.
3. Statement of understanding of the Town's needs and acceptance of RFP terms.

### **B) Company Background**

1. Number of years in business.
2. Location of main office and support centers.
3. Overview of municipal clients in North Carolina.

### **C) Software Features & Implementation Plan**

1. Description of the proposed software solution and how it meets the Town's needs.
2. Timeline for system implementation and data migration.
3. Training plan for staff, including on-site or virtual training options.
4. Ongoing customer support availability and response times.

### **D) References**

1. At least three municipal clients are currently using the proposed software.
  2. Contact details for references, including name, title, and organization.
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## **PRICING & CONTRACT TERM**

1. **Pricing Structure:**
  - One-time implementation and setup costs.
  - Annual software licensing and maintenance fees.
  - Optional add-ons or service fees.
2. **Contract Duration:**
  - Initial three-year agreement with the option to extend.



### 3. Payment Terms:

- Invoicing schedule and any discount structures.

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## TIMELINE & SUBMISSION

Milestone	Date
RFP Issuance	4/09/2025
Deadline for Questions	4/16/2025
Proposal Submission Deadline	4/30/2025
Vendor Demonstrations (if required)	5/09/2025
Estimated Award Date	5/14/2025

### Submission Instructions:

Vendors must submit proposals by April 30, 2025, at 4:00 pm. Submissions should be sent electronically and/or via hard copy to:

Christina Ynclan  
Town of Rolesville  
502 Southtown Circle  
Rolesville, NC 27571  
[cynclan@rolesvillenc.gov](mailto:cynclan@rolesvillenc.gov)  
919-556-3506 x 112

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## SELECTION PROCESS

Proposals will be evaluated based on the following criteria:

- **Functionality & Ease of Use (30%)** – How well the software meets the Town’s requirements.
- **Cost Effectiveness (25%)** – Total cost of ownership, including licensing and support fees.
- **Implementation & Training (20%)** – Vendor’s approach to system setup and staff onboarding.
- **Experience & References (15%)** – Track record of successful implementations in local governments.



- **Customer Support & Security (10%)** – Ongoing support services and compliance with data security best practices.

A selection committee will review proposals and may invite shortlisted vendors for demonstrations.

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## **GENERAL TERMS & CONDITIONS**

- The Town of Rolesville reserves the right to reject any or all proposals.
- The Town is not responsible for any costs incurred in the preparation or submission of proposals.
- Any contract award is subject to funding availability and the Board of Commissioners' approval.

For questions regarding this RFP, contact Christina Ynclan at [cynclan@rolesvillenc.gov](mailto:cynclan@rolesvillenc.gov) or 919-556-3506 x 112.