

Document Management System

REQUEST FOR PROPOSAL

EXECUTIVE SUMMARY

The Town of South Windsor invites perspective firms to submit proposal for the replacement of our electronic Document Management System (DMS). The respondents shall provide a solution that includes document imaging, optical character recognition, naming, tagging, storage, security and retrieval of documents. The system should accommodate documents of various sizes (letter, legal and tabloid). The system needs to be robust enough for all Town Departments.

DESCRIPTION OF PROJECT

Replace existing Document Management System including the conversion of the existing data contained within the current Document Management System. The town's current system has approximately 75,000 records (71 GB database) and currently has eleven (11) data entry/indexing templates. The new system will be used by both South Windsor staff and the public.

OBJECTIVES

- Improve public access to information by offering online access to records. Provide better service to the public by improving the quality and quantity of information available and by providing easier access to the information
- Insuring compliance with Town of South Windsor security policies and the State of Connecticut Record Retention and Freedom of Information laws.
- Increase productivity and efficiency by reducing paper handling;
- Reduce physical storage needs for archiving documents

Technical Summary Requirements

1. Document Imaging
 - a. Ability to work with various document scanning equipment, including multi-function printers, large scale scanners, plotters and desktop scanners
 - b. Ability to work with previous scanned documents, including PDF and JPG files
2. Optical Character Recognition
 - a. Ability to perform optical character recognition of scanned documents so that they become searchable
3. Naming/Tagging
 - a. The solution will provide naming convention defaults and document tags to be determined by the town
 - b. The solution will have the option to set up multiple naming and tagging defaults based on document type

4. Storage/Retrieval
 - a. The solution will provide document retrieval options that allow for searches based on defined templates
5. Security
 - a. The solution will provide user-based security that protects documents from unauthorized access, modification and/or deletion;
 - b. The solution will work with the Town's current backup system and shall follow the town active directory policies.
6. File Transfer
 - a. The solution shall provide for the transfer of existing documents from the current document management program

Installation, Setup and Training

Proposals should include installation of the suggested solution, including equipment, setup and, conversion of existing data and training

Service and Maintenance

Proposal shall include warranty information on the solution including length of warranty and available extension. Annual maintenance/licensing fee (if applicable) with any escalators should be included.

SCOPE OF WORK

1. Selected firm is expected to meet at least three (3) times with the Project Team: kick-off, mid-point progress design and final installation.
2. The Selected Firm will be required to:
 - a. Provide software for a Document Management System
 - b. Provide plan, detail and schedule for software set up, data conversion and training of employees.

PROPOSALS

A. Deadline

Proposals are due into the Office of the Town Manager, South Windsor Town Hall, 1540 Sullivan Avenue, South Windsor, CT 06074 by 4:00 p.m April 18, 2019. Questions regarding this RFP may be directed to Michele R. Lipe, AICP (860) 644-2511, extension 252 or Michele.lipe @southwindsor.org

B. Organization and Content

Five copies of the proposal are to be submitted. Proposal shall include:

1. General information about the firm.
2. Experience of firm with similar projects. As a minimum, firm should have experience in three projects of this type (preferably with a government entity).
3. Resumes of key personnel to be assigned to this project.

4. Proposed project schedule.
5. References (minimum of three municipal references; At least one active installation in Connecticut that has been operational for more than 3 years.)
6. Proposal in lump sum cost of the design and Project Management portion and hourly rate schedule of personnel assigned to this project.
7. Any annual maintenance and license fee for the first 5 years.
8. Methodology the firm will use in the development of the project based upon Scope of Services and any other details the responding firm deems appropriate.

D. Conditions

The Consultant must be willing to adhere to the following conditions with the Town:

1. Have personnel reserve sufficient to assure task continuity, and agree that all personnel proposed are committed for the full duration of the contract. If a change is required, the Town shall be notified and will judge whether the substitution will impair the success of the project.
2. Agree that all sub-consultant hired by the Consultant must be included in the credentials submitted with the proposal and must be approved by the Town prior to working on any project.
3. Agree that all work produced under this agreement is to become the property of the Town of South Windsor and to turn over to the Town all original documents upon completion or request.
4. Agree to conform to all applicable laws and ordinances and statutes of the Federal Government, State of Connecticut, and Town of South Windsor.
5. Agree that the Town reserves the right to terminate the contract at any time with the assurance that the Consultant shall be entitled to reimbursement for any services rendered prior to receipt of Notice of Termination.

- E. The Town will select firms using a Qualification Based Selection process. A semifinal selection of Consultants will be invited to an interview with, and to make a detailed presentation to a Selection Committee.

Each Consultant will be notified of the location and the time of interview at a later date. The Town intends to award a contract to the most responsible firm, or to the Consultant whose proposal is determined to be in the best interest of the Town. The Town reserves the right to reject or modify any proposal or parts thereof for any reason, to negotiate changes to the proposal terms and to waive minor inconsistencies within this RFP. All proposals will be evaluated in accordance with the following criteria:

1. Consultant's understanding of the services required.
2. Consultant's proposed method of accomplishing the project.
3. Availability and competence of personnel proposed for the project.
4. The nature of the Consultant's project management approach.
5. The background and experience of the firm in providing similar services elsewhere.
6. Competitiveness of the proposed fees and costs.

F. Insurance

The successful Consultant shall be required to furnish evidence of the following insurance coverage within ten (10) days from the notification of the contract being awarded. Insurance coverage shall remain in full force for the duration of the contract term including any and all extensions. All renewal certificates shall be furnished at least ten (10) days prior to the policy expirations.

- i. Commercial General Liability:

Each Occurrence:	\$1,000,000
General Aggregate:	\$2,000,000
Product/Completed Operations Aggregate	\$2,000,000
Fire Damage Legal Liability	\$100,000
- ii. Automobile Liability:

Each Accident:	\$1,000,000
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- iii. Worker's Compensation, as required by Connecticut statutes.
- iv. The "Town of South Windsor" is to appear as an additional insured on the contractor's general liability and automobile liability Certificates of Insurance.
- v. All insurance is to be provided by a company authorized to issue such insurance in the State of Connecticut with a Best rating of no less than A:VII.
- vi. All insurance may not be canceled or modified without thirty (30) days written notice be registered U.S. Mail to: Town Manager, Town of South Windsor, South Windsor Town Hall, 1540 Sullivan Avenue, South Windsor CT 06074.
- vii. The limits of insurance may either be met as stated above, or in combination with an umbrella or excess liability policy.

All insurance policies required above shall be primary and non-contributory with any insurance or self-insurance programs carried or administered by the Town.

The selected firm shall direct its insurance carrier(s) to provide the Town with a Certificate of Insurance PRIOR TO commencing work and yearly thereafter through the end of the agreement. The Certificate shall specifically state that the Town shall receive thirty (30) days advance written notice of cancellation or non-renewal, via registered U.S. mail, addressed to Town Manager, Town of South Windsor, South Windsor Town Hall, 1540 Sullivan Avenue,

South Windsor CT 06074. The Certificate shall evidence all required coverage. **All requirements of this section shall be clearly stated in the remarks section of the successful bidder's Certificate of Insurance.**

These insurance requirements are the Town's general requirements. The selected firm's insurance requirements are subject to final negotiations. The Town reserves the right to request from the selected firm a complete, certified copy of any insurance policy.

For more information about South Windsor, please visit our website at www.southwindsor.org