



**Town of Wellfleet
Records Management and Archiving
Request for Proposals**

The Town of Wellfleet is accepting sealed proposals for updating the Town's existing records archive and implementing a records management process for the future archiving of written documents. Complete specifications and RFP packet is available from the Town of Wellfleet.

To receive Instructions to Proposers and a detailed description of requested services, contact:

Michaela Miteva
Executive Assistant to the Town Administrator
Town of Wellfleet
300 Main Street
Wellfleet, MA 02667
508-349-0300
Michaela.Miteva@wellfleet-ma.gov

Sealed proposals are may be submitted at the Town Administrator's Office at 300 Main Street, Wellfleet, MA 02667 until 2:00 PM on August 25, 2014, 2014. The clock in the Administration Office shall be the sole determining factor of time.

The Town reserves the right to waive any informality in the proposal procedure, to cancel this Request for Proposal or to reject any and all proposals received deemed not in the best interest of the Town.

Project Description & Scope of Services

1. Project Description and Scope

The Town of Wellfleet maintains a large number of paper records. Many are stored in cardboard “banker’s boxes” at various locations in Town buildings. The Town now seeks proposals to examine existing archives and, where the condition of existing boxes requires, replacing the box. Existing boxes in acceptable condition will be incorporated into an archive system “as is” only correcting indexing as necessary. Records removed from Town department files will be indexed and placed in storage boxes and the department from which the records have been removed will receive a document identifying the records removed and their location in the archive. The approximate number of existing boxes is 115.

The successful proposal will include a system of boxes that can be stored efficiently and are “small enough” to be handled by office staff without undue physical demands. “Small enough” as used herein refers to boxes enclosing a volume of approximately 1 cubic foot. The successful proposal will also include a shelving system capable of storing the existing boxes and newly boxed records. Shelving must be able to accommodate the existing records and some room for additions. The total volume of storage required is estimated to be 1,020 cubic feet (including existing boxes). Shelving has to be labeled and numbered in a manner that allows ready location of each box.

The proposal must include the labor costs, including benefits, taxes and other related expenses for creating new boxes, including assembly, indexing, inserting records, transportation within the Town to the archive location, placement in storage and providing a receipt to the department whose records are archived with a copy to the Town Clerk. The proposal must also include the same labor costs for processing existing boxes, including providing a receipt as to content and location to the department whose records are processed and to the Town Clerk. The aforesaid receipts will also be maintained in electronic format so that the information contained in them can be incorporated into a searchable records database.

The proposal must include records management software which will allow the Town to maintain a current inventory of archived documents including the location of each archive box and its contents and a log for tracking the location of each box including withdrawal of a box pursuant to a records request. The software “check out/check in” log must include the date and time of removal and replacement, identify who removed or returned the archive box and the new location of the archive box. The software must include or be accompanied by a clear, concise operation instructions including backup and restore procedures.

The proposal must include the cost for all labor and materials (boxes, shelving, labels, transmittal documents and electronic records necessary to process 115 existing boxes of records and 1,020 one cubic foot volume boxes for new records.

The proposal must include unit cost for processing additional existing boxes should the number exceed 115 and a credit amount should the number processed be less than 115. The proposal must include the unit cost for processing new records boxes should the number exceed 530 and a credit amount should the number processed be less than 530.

Records eligible for destruction pursuant to the Massachusetts Public Records Law and Regulations will be identified, removed and segregated and a request for permission to destroy the same shall be prepared for submission by the Town to the Supervisor of Public Documents for approval.

The proposal must also include two training sessions (which can be on the same day) instructing staff on the proper method of packing and indexing boxes, the proper method of documenting the contents and location of each box once archived and the process for requesting retrieval of a box.

The proposal must include pricing for the purchase of additional boxes, box labels, a transfer/request forms “kit” and security tape.

2. Location and Approximate Volume of Records

An approximate inventory of existing records is in “Schedule A, Records Inventory.” The schedule is believed to be accurate, but accuracy is not guaranteed.

3. Availability of Volumes and Documents for Inspection

All sites are available for inspection by appointment.

4. Scope of Services

All procedures are to be performed by the vendor in accordance with generally accepted standards.

The Scope of Services will be inclusive of all labor, services, and supplies, including mileage, transportation, shipping, fees and other charges required to acquire and install the equipment.

5. Warranty

All equipment and installation shall be warranted by the vendor for a period of not less than one year against defects. All warranty repairs shall be conducted by the vendor on site unless the equipment manufacturer requires return of equipment for servicing.

General Information and Proposal Submittal Requirements

1. Preparation of Proposals

A. Sealed proposals will be accepted at the Office of the Town Administrator until 2:00 PM, August 25, 2014. The proposal shall have written on the outside “RFP: Wellfleet Records Archive Proposal.” Proposals received after the time and date deadline will be rejected.

B. Within the sealed proposal submissions should include a “Technical Proposal” and in a separate sealed envelope a “Price Proposal.”

C. Technical Proposal

The Technical Proposal shall contain the following items:

1) General Information

Provide a general description of the firm and its expertise related records management and archiving services for local governmental entities. Provide detailed information about experience working with municipalities on specific broadcast projects.

Minimum Requirement: The proposer must provide evidence that they have been in the business of providing archiving materials and services for more than three (3) years.

2) Project Approach

Each proposer shall describe how they will approach the work to be performed as outlined in the Scope of Services. The proposer should review key processes and procedures. Any deviation from the Scope of Services details shall be specifically stated and explained.

3) Software

The vendor is required to identify the specific materials that will be used. The vendor is required to identify software included in the proposal and must specify the scope and length of any support services included in the proposal.

4) Time Schedule

The proposer shall provide a timetable explaining each major task and key date benchmarks. The proposer shall specify the number of days by which all work will be completed.

5) Project Staff

Each proposer shall provide the names and vitae of all key professionals to be assigned to the project. Provide names and resumes of key professionals who would be assigned to the project. Each person's education and experience shall be listed. The project manager shall be clearly identified and a description of his/her relevant previous projects listed. A list of past similar projects which proposed project staff have played a central role in completing, shall be also provided.

6) Subcontractors (if any)

Each proposer shall provide the names, addresses and contact information on all firms to be subcontracted work for the project.

7) References

Each proposer shall provide a list of references containing a complete list of all document archive projects whether successfully or unsuccessfully completed within the past three (3) years. The list shall contain:

- a. The name of each organization
- b. A description of each project, project services provided, and the scope/size of the project.
- c. Date the project started and when it was completed.
- d. Contact information for each project including name and telephone number.

Any additional references and experience documented in excess of three (3) years should include at minimum highlights of select experience and references sufficient to allow the Procurement Officer to confirm the vendor's prior experience.

8) Proof of Insurance

The proposer shall provide proof of insurance in not less than the following amounts:

General Liability

Bodily Injury	\$1 million per occurrence
Property Damage	\$1 million per occurrence
(or combined single limit)	\$1 million per occurrence

Automobile Liability

Bodily Injury	\$1 million per occurrence
Property Damage	\$1 million per occurrence
(or combined single limit)	\$1 million per occurrence

Workers Compensation As required by Mass General Laws

2. Interpretations

A. No interpretation of the meaning of the RFP will be made to any proposer orally. Every request for such interpretation shall be in writing addressed to Harry Sarkis Terkanian, Town Administrator, Town of Wellfleet, 300 Main Street, Wellfleet, MA 02667 and to be given consideration, must be received no later than 2:00 PM on August 18, 2014. Written answers to all questions will be prepared and sent to all firms or individuals sending questions and others upon request by August 20, 2014. Any and all such interpretations and any supplemental instructions will be in the form of written Addenda to the RFP (at the respective addresses furnished for such purposes).

B. Failure of any proposer to receive any such Addenda shall not relieve such proposer from any obligation under his/ her proposal as submitted. All Addenda so issued shall become part of the RFP. At the same time of the opening of the proposals, each proposer will be presumed to have read and to be thoroughly familiar with the RFP (including all Addenda). The failure or omission of any proposer to examine any form, instrument, or document shall in no way relieve any proposer from any obligation with respect to his/her proposal.

C. Any proposer who desires to receive notice of any Addenda issued must request that they receive notice of the same and shall include with such request a valid US Postal Mail address and a valid email address. Where both addresses are given, the Town will notify vendors of Addenda by email. The Town assumes no responsibility for failure of any vendor to receive any such notice of Addenda.

3. Submission of Proposals

A. The proposer shall submit an original plus three (3) copies of the proposal.

B. The proposer shall submit the proposal with a letter of transmittal signed by an authorized official of the firm. Marketing materials which do not directly support, illustrate or illuminate the proposal should not be included.

C. Each proposal shall be submitted in a sealed envelope with the following marked on the outside: "**Proposal for Records Management and Archiving.**" The proposal must be

submitted in two (2) individually sealed envelopes. One envelope shall contain the completed "Price Proposal Form," and shall be entitled, "Price Proposal." The second envelope shall contain the rest of the proposal including complete answers to all evaluation questions, and shall be entitled, "Technical Proposal." All references to the proposal price shall be submitted on the form provided, with the proposal, but in a separate, sealed envelope marked "Price Proposal." No references to price shall be contained in the "Technical Proposal". The separate "Price Proposal" envelope may be included in the sealed "Technical Proposal" envelope.

- D. A complete proposal shall include the following documents:
1. Letter of transmittal
 2. Technical Proposal with appropriate submissions
 3. Proof of Insurance
 4. Certificate of Non-Collusion
 5. Tax Compliance Certificate
 6. Bid Signatures Page
 7. Price Proposal (in a separate envelope)

A proposal deemed incomplete will be rejected.

- E. If the proposal is mailed, the Proposer shall enclose his/her sealed proposal in an outer envelope and address it as follows:

Michaela Miteva,
Executive Assistant to the Town Administrator
Town of Wellfleet
300 Main Street
Wellfleet, MA 02667

All proposers are cautioned to allow ample time for transmittal of proposals. Proposals received after the specified times will not be accepted or recognized. Note that the times of receipt in the Town Administrator's office will determine the acceptability of mailed proposals regardless of postmark.

NOTE: The Town will not be held responsible for premature opening of proposal envelopes that are not properly filled out in accordance with the instruction set forth herein.

4. Withdrawal or Modification of Proposals

- A. A proposal may be withdrawn by written request, providing that such request is received prior to time established herein for the opening of Proposals. The Town will not be responsible, however, for the timely receipt of any request for withdrawal in ample time for delivery before the proposal opening hour.
- B. Modifications to proposals may be submitted prior to the date and time specified for the receipt of proposals.

- C. An original plus three (3) copies of any modifications must be submitted together with a letter of transmittal signed by an authorized official of the firm.
- D. Modifications must be submitted in sealed envelopes clearly marked, "**Proposal for Records Management and Archiving**, Modification No. ____ "(with each proposer's modifications numbered in sequence).
- E. Modifications must be clearly marked showing whether the modification is to the "Price Proposal" or to the "Technical Proposal."
- F. Modifications may only be comprised of replacement pages and/or insertion pages, together with an index of modifications.

5. Evaluation of Proposals

- A. All proposals shall be received and evaluated in conformance with the requirements of MGL Chapter 30B, 24CFR Part 85.
- B. The Procurement Officer will separate the "Technical Proposals" from the "Price Proposals." The price proposals will be opened after the proposers have been reviewed, evaluated, and ranked. The opening of the price proposal shall be open to the public.
- C. The Procurement Officer, with the assistance of additional Town employees if deemed appropriate in the Procurement Officer's sole discretion, shall review each "Technical Proposal" to determine whether it meets the minimum requirements as set forth in the RFP. Failure of a proposal to meet a minimum requirement will disqualify a vendor's proposal from further consideration. The Procurement Officer shall state in writing his reasons for disqualifying any proposal.
- D. In analyzing responses to the evaluative criteria, the Town shall consider the qualifications of proposers in the determination of the Successful Proposer, and make any investigations deemed relevant to the selection process. The minimum criteria shall be in compliance with specifications and criteria set forth therein; attributes of goods or services proposed, investigations into qualifications, prior relevant experience, and past performance. The Town will confirm claims of past experience. The comparative evaluation criteria are set forth below.
- E. Comparative Criteria:
Remaining qualified proposals will be comparatively evaluated with the below Comparative Criteria scores:
Highly Advantageous 3 points
Advantageous 2 points
Not Advantageous 1 point

The following will be the Comparative Criteria for reviewing these proposals:

- 1) Years of experience of the proposer's organization and staff providing records management and archiving:
Highly Advantageous: The proposer and each staff person assigned to the project have 10 or more years of experience providing records management and archiving.
Advantageous: The proposer and each staff person assigned to the project has no less than 5 years, but less than 10 years of experience providing records management and archiving.
Not Advantageous: The proposer and each staff person assigned to the project have less than 5 years of experience providing records management and archiving.
- 2) Evaluation of the proposer's proposed records management software:
Highly Advantageous: The proposer's software has clear and straightforward procedures for indexing records, searching for records, logging the location of record boxes. The software includes backup and restore procedures. The software includes or is accompanied by an operations guide that is clear and easy to understand. The software can be run from a central location that is accessible to all departments.
Advantageous: The proposer's software has clear and straightforward procedures for indexing records, searching for records, logging the location of record boxes. The software includes or is accompanied by an operations guide that is clear and easy to understand.
Not Advantageous: The proposer's software lacks clear and straightforward procedures for indexing records, searching for records, logging the location of record boxes. The software lacks an operations guide that is clear and easy to understand.
- 3) Evaluation of the proposer's plan and methodology for providing records management and archiving:
Highly Advantageous: The proposal contains a clear and comprehensive quality work plan and methodology that effectively addresses all of the Scope of Work.
Advantageous: The proposal contains a clear and quality work plan and methodology that demonstrates a satisfactory understanding of the Scope of Services.
Not Advantageous: The proposal work plan is incomplete or insufficient in demonstrating an understanding of the Scope of Services or lacking in detail regarding work processes and/or materials.
- 4) Evaluation of vendor's storage boxes and shelving material:
Highly Advantageous: The storage boxes and shelving are of a quality and specifications such that storage boxes and shelving are expected to remain usable for many years.
Advantageous: The storage boxes and shelving are acceptable quality and specifications.
Not Advantageous: No information of the quality and specifications of storage boxes and shelving is provided or the Town is unable to evaluate the quality or specifications of storage boxes and shelving from the materials provided.
- 5) Results of reference checks:

Highly Advantageous: References were checked and the overall feedback was positive from all references.

Advantageous: References were checked and the feedback was positive for all but one of the references.

Disadvantageous: References were checked and the feedback was negative for more than one of the references.

6. Right to Reject Proposals

The contract will be awarded to the most advantageous proposal considering both proposal rank and price as determined by the Town. The Town reserves the right, upon basis of such evaluations, to reject the Proposal of any and all Proposers who do not, in its estimation, pass under such evaluations, or to select a Proposer other than the apparent lowest cost proposer if the investigations indicate that such action is in the Town's best interest.

7. General Contract Information

- A. The Town of Wellfleet is exempt from paying any and all otherwise applicable state and federal sales taxes under the following tax-exempt identification number: 04-6001345.
- B. The contract documents will include the Request for Proposals, General Specifications, Proposal Specifications and Proposal submitted.

All documents prepared for the project shall remain the property of the Town of Wellfleet subject to the specific requirements of the grant. Selection shall be subject to additional discussions and/or negotiations based on proposals received.

*Records Management and Archiving
Request for Proposals*

CERTIFICATE OF NON-COLLUSION

The undersigned certifies under penalties of perjury that this quote has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club or other organization, entity, or group of individuals.

(Signature of individual submitting proposal)

(Name of Business)

COMMONWEALTH OF MASSACHUSETTS

County of _____ ss.

On this the _____ day of _____, 2006 before me,

_____, the undersigned Notary Public,
Name of Notary Public

personally appeared _____,
Name of Document Signer

proven to me through satisfactory evidence of identity, which was:

Description of Evidence of Identity

to be the person(s) whose name (es) was/were signed on the preceding or attached document in my presence.

Signature Notary Public

Printed Name of Notary

Place Notary Seal and/or any Stamp Above

My Commission Expires: _____

TAX COMPLIANCE CERTIFICATE

Pursuant to M.G.L. c. 62C, ss 49A, I certify under the penalties of perjury that, to the best of my knowledge and belief, I am in compliance with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting of child support.

(Signature of individual submitting proposal)

(Name of Business)

COMMONWEALTH OF MASSACHUSETTS

County of _____ ss.

On this the _____ day of _____, 2006 _____ before me,

_____, the undersigned Notary Public,
Name of Notary Public

personally appeared _____,
Name of Document Signer

proven to me through satisfactory evidence of identity, which was:

Description of Evidence of Identity

to be the person(s) whose name (es) was/were signed on the preceding or attached document in my presence.

Signature Notary Public

Printed Name of Notary

Place Notary Seal and/or any Stamp Above

My Commission Expires: _____

Bid Signature Authorization Page

Name of Company

Telephone Number

Name and Title of Individual Authorized to Sign

Fax Number

Signature

Date

PRICE PROPOSAL FORM

Records Management and Archiving Project Price: \$ _____

Unit price for processing existing boxes in excess of 115 boxes: \$ _____

Unit credit for processing less than 115 existing boxes: \$ _____

Unit price for processing new records boxes in excess of 530: \$ _____

Unit credit for processing less than 530 new records boxes: \$ _____

Pricing in quantity (specify quantity) or unit price for additional boxes: \$ _____

Pricing in quantity for additional box labels (specify quantity): \$ _____

Having fully examined, read, and in understanding of the requirements for this job and being familiar with all of the conditions surrounding the proposed work, including any addenda for which receipt of is acknowledged below, the undersigned proposes to complete all work as specified in this invitation to bid for the price stated above.

Date _____

By _____

(Name/Title of person signing proposal)

(Company)

(Business Address)

(City, State, Zip Code)

ATTENTION: YOU MUST SUBMIT THE PRICE PORTION OF YOUR PROPOSAL SEPARATELY FROM THE TECHNICAL PROPOSAL TO AVOID DISQUALIFICATION FROM FURTHER CONSIDERATION

Records Management and Archiving
Request for Proposals
SCHEDULE A
Records Inventory

Town Hall – Basement Storage Room (off kitchen):

Legal size file cabinets: 4 four drawer

Letter size file cabinets: 2 four drawer

Assorted boxes: 55 various sizes from check register boxes to standard boxes

Plastic Bins: 8

Storage cabinet: 2 drawers

Miscellaneous rolled plans

Town Hall – Basement Hearing Room:

Legal file cabinets: 1 four drawer

Letter size file cabinets: 1 four drawer, 2 two drawer

24” Plastic Bin: 1

Town Hall – Basement Vault:

Ledger books: 290

Other historical records: payroll registers, assessing records, minutes.

Town Hall – Town Clerk/Treasurer Vault

Bound registers of vital statistics: 117

Computer printout binders: 70

Miscellaneous small boxes, items to be filed, etc.

Rolled plans: approximately 40 rolls

Town Hall – Stairway Accounting and Town Clerk storage

Standard boxes: approximately 40

Miscellaneous small boxes, plastic bins, etc.

Town Hall – First Floor Accountant Office

Standard boxes: 17

Town Hall – First Floor Assessor Office

Three drawer vertical cabinet: 1

Four drawer vertical cabinet: 1

Deed books: 79

36” wide cabinet: 12 drawers

Town Hall – First Floor Collector’s Office

Three ring binders: 28
Check boxes: 4
36” drawer: 1

Town Hall – Second Floor Town Administrator

File cabinets: 6 four drawer, one 5 drawer and 1 two drawer
Four drawer vertical cabinet: 1
One storage box

Town Hall – Second Floor Selectmen’s Office

Boxes 26 (mostly standard size)
File cabinets: 1 two drawer and 2 four drawer
Shelving with various materials.

Town Hall – Second Floor Committee Secretary

File cabinets: 1 four drawer
Shelving with 3 ring binders – approximately 34”
Stacks and piles of additional documents.

Town Hall – Second Floor Recreation Department

1 24” box
1 four drawer file cabinet.
Additional records in other locations

Fire Department

Letter size file cabinets 2 five drawer, 9 four drawer, 1 three drawer, 2 two drawer
Records boxes: 44

DPW Building – Plumbing/Electrical/Building

Filing cabinets: 11 four drawer
24” boxes: 23

DPW Building – DPW

24” boxes: 66
15 odd boxes
Four drawer file cabinets: 1

Police Station – Police Department

Four drawer file cabinets: 22
Five drawer file cabinets: 1

Marina - Harbormaster Office

Odd boxed: 14

Four drawer file cabinets: 3

Two drawer file cabinet: 1

Bookcases: 105' shelf space

Library

Two drawer file cabinet: 2

24" boxes: 2

Microfiche: small closet, 2 small boxes