

OUTAGAMIE COUNTY

REQUEST FOR PROPOSAL

FOR

PHYSICAL RECORDS MANAGEMENT SOFTWARE

FOR

MIS DEPARTMENT – MICROGRAPHICS DIVISION RECORDS CENTER

DUE BY: February 6, 2014

1.0 Introduction and Background

The Outagamie County MIS Department's Micrographics Division is seeking records management software to manage the boxes in the MIS Records Center. There are other historical items such as books, ledgers and binders that should be managed through this software if possible. All County departments may use the MIS Records Center for storage of their physical records if appropriate space does not exist in their departments.

2.0 Specifications

The software shall meet the following minimum requirements –

1. Utilize space management for a minimum of 10,000 boxes/spaces
2. Ability to run a report that will show the total number of spaces, total number of used spaces and total number of vacant spaces
3. Ability to provide a report summary that will show the total number of boxes that are stored for each department
4. Ability to run a report that includes all box information in location order to be used for physical inventories
5. Ability to run a report for all records marked vital and sorted by location
6. Ability to run standard reports (state in proposal what your standard reports are)
7. Ability to run custom reports (i.e. a department box report which will show all boxes being stored for one department which could be sorted by location, series order or any other field requested by the department)
8. Create and print box labels (4 per page, similar to Avery 8168) Box labels to include Department, Department Box Number, Description of Records, Location of Records and Destruction Date. Ability to query the system by a date range to select boxes that will be eligible for destruction and list those items in a standard form utilizing checkboxes, which is signed and returned by the department (i.e. a destruction authorization form)
9. Ability to add comments for a particular box that can be printed or omitted from printing on reports
10. Ability to run various searches on box data to include records series, department, location, box contents, destruction date, date destroyed, etc
11. Ability to import information from our current Access database
12. Licensing for five named users

3.0 Hardware Requirements

Vendors shall provide the server specifications to run the software (i.e. disk space, processor speed, memory, etc). If the software is able to run in a virtual environment, provide that information as well.

4.0 Installation and Training

Provide options in your proposal for installation and/or training on the software.

5.0 References

Provide a minimum of three and a maximum of five similar references that you have supplied the proposed software to. Include company name, location, contact name, email and phone number.

6.0 **Vendor Presentation**

A vendor may be selected to provide a software demonstration. By submitting the proposal you are confirming your ability to provide a demo, either onsite at our location in Appleton, WI or web-based demo at no charge to the County.

7.0 **Pricing**

On the proposal form, you will reference the lump sum cost of the software which shall include the first year of maintenance. We are also requesting the annual maintenance charge for years 2-5.

8.0 **Proposal Submittal**

Provide one original (unbound) proposal and two copies. Failure to provide all requested information below may result in the rejection of your proposal. Your proposal must include the following –

- Proposal Form
- Affirmation of the software's ability to perform all tasks as referenced in Section 2.0, if you are unable to provide a task state that you are unable to
- Hardware requirements as requested in Section 3.0
- Installation and training options as requested in Section 4.0
- References as requested in Section 5.0

9.0 **Contact Information**

Purchasing Policy Information

Nicole Schoultz

Outagamie County, Purchasing Coordinator

(920) 832-6083

Nicole.Schoultz@Outagamie.org

10.0 **Clarification and/or Revisions to the Specifications and Requirements**

Proposer must examine the RFP documents carefully and before submitting a Proposal may request additional information or clarification. A Proposer's failure to request additional information or clarification shall preclude the Proposer from subsequently claiming any ambiguity, inconsistency, or error.

The County will issue responses to inquiries and any other corrections or amendments it deems necessary in written addendum prior to the due date. Proposers should rely only on the representations, statements or explanations that are contained in this RFP and the written addenda to this RFP. Where there appears to be a conflict between the RFP and any addendum issued, the last addendum issued will prevail.

It is the Proposer's responsibility to assure receipt of all addenda, which will be posted to the County's website (www.outagamie.org) then Bids & Proposals and will be referenced under this project. Upon posting, such addenda shall become part of the RFP and binding on Proposer(s).

11.0 **County Reservation**

Outagamie County openly solicits the best possible value on all of our "Requests for Proposals".

Because we are a local government, we are able to purchase directly from many of the state and federal contracts. However, in order to not discriminate against our local proposers, we openly solicit proposals of similar pricing structure from all qualified proposers. In the event that all proposals received are in excess of any existing state or federal contract that is available to Outagamie County, we may at our discretion, reject all proposals, and purchase directly from the vendor awarded the state or federal government contract. Outagamie County reserves the right to accept or reject, any or all proposals, in whole or in part, as deemed in the best interest of the County.

- a. This proposal request does not commit Outagamie County to make an award or to pay any costs incurred in the preparation of a proposal in response to this request.
- b. The proposals will become part of Outagamie County's files without any obligation on Outagamie County's part.
- c. The Proposer shall not offer any gratuities, favors, or anything of monetary value to any official or employee of Outagamie County for any purpose.
- d. The vendor shall report to Outagamie County any manufacturer product price reductions, model changes, and product substitutions. No substitutions are allowed without prior approval from Outagamie County.
- e. Outagamie County has the sole discretion and reserves the right to cancel this proposal and to reject any and all proposals received prior to or after award to re-advertise with either an identical or revised specification.
- f. Outagamie County reserves the right to request clarifications for any proposal.
- g. Outagamie County reserves the right to select elements from different individual proposals and combine and consolidate them in any way deemed to be in the best interest of Outagamie County.

12.0 Closing Date

Proposals will be received up to 2:00 pm CT, February 6, 2014.

13.0 Proposal Submittal

Proposals shall be marked "RFP – Records Management Software) and mailed or delivered to –
Outagamie County Purchasing
Attn: Nicole Schoultz
410 S Walnut St
Appleton, WI 54911

Only sealed proposals will be accepted, neither fax nor email will be acceptable.

14.0 Taxes

Outagamie County is exempt from Federal Excise Tax (39-6005724), Wisconsin Sales Tax (ES 41005), but if there is a tax, such as local or county, it must be shown in the proposal.

15.0 Method of Procurement

The method for this procurement is competitive proposal, pursuant to Chapter 22 of the Outagamie County Code of Ordinances.

16.0 **Venue**

This agreement will be governed and construed according to the laws of the State of Wisconsin.
This agreement is performable in Outagamie County.

17.0 **Status of Proposal**

Upon award, proposals will be considered public record and details will be posted online.

PROPOSAL FORM
Records Management Software

Proposals Due: February 6, 2014 -- 2:00 pm CT

Mail/Deliver Proposals To: Outagamie County Purchasing
Attn: Nicole Schoultz
410 S Walnut St
Appleton, WI 54911

Lump Sum of Software
for 5 Named Users and 1st Year Maintenance \$ _____

Annual Maintenance – Year 2 \$ _____

Annual Maintenance – Year 3 \$ _____

Annual Maintenance – Year 4 \$ _____

Annual Maintenance – Year 5 \$ _____

Include all information as requested in Section 8.0

Firm Name: _____

Authorized Signature: _____

Printed name: _____

Title: _____

Date: _____

Address: _____

City/State/Zip: _____

Phone/Fax: _____

E-mail: _____