

**TOWN OF PITTSFIELD  
REQUEST FOR PROPOSALS  
DOCUMENT SCANNING AND RECORD MANAGEMENT SYSTEM**

The Town of Pittsfield is requesting proposals to digitally scan and index existing files and provide a document management software system. Quotations are due by 11:00 am on Thursday, October 20, 2022. Copies of the RFP may be obtained from the Pittsfield Town Office, 112 Somerset Avenue, Pittsfield, ME 04967 (487-3136) or [www.pittsfield.org](http://www.pittsfield.org)

## TOWN OF PITTSFIELD

### REQUEST FOR PROPOSAL

#### NOTICE TO INTERESTED PARTIES

September 06, 2022

1. Quotations will be received at the Pittsfield Town Office, 112 Somerset Avenue, Pittsfield, Maine 04967 until **11:00 AM, Thursday, October 20, 2022**. All quotations shall be submitted in sealed envelopes and be plainly marked "**RFP - Document Scanning and Record Management System.**" No quotations will be accepted by facsimile (FAX) or e-mail transmission.
2. Quotations will be opened publicly by the Town Manager or her designated representative at **11:00 AM, Thursday, October 20, 2022**.
3. The successful individual or firm must provide proof with their proposal that he/she/it is adequately covered by insurance as follows:
  - a. The individual or firm will serve in the capacity of an independent contractor and will maintain insurance to protect it and the Town from any and all claims for personal injury and property damage, and for claims under the Workers' Compensation Acts for the term of the contract.
  - b. Comprehensive General Liability insurance policy with the following limits of coverage:  
Bodily Injury:       \$1,000,000  
  
Property Damage:   \$400,000  
  
Aggregate:         \$1,000,000 of all claims per occurrence
  - c. Comprehensive Automobile insurance policy with the following limits:  
Bodily Injury:       \$1,000,000  
  
Property Damage    \$400,000 per occurrence
  - d. All insurances must be issued by an insured licensed, authorized and maintaining an office to do business in the State of Maine.
  - e. The Town shall be listed as additional insured on all policies except for Workers' Compensation.
4. The Town of Pittsfield assumes no liability for any costs incurred by respondents or in responding to requests for additional information or interviews prior to the issuance of a contract.

5. All proposals for the RFP – Document Scanning and Record Management System must include the following:
  - a. Detailed Work History;
  - b. Three (3) or more Contract Work References;
  - c. Qualifications and experience with providing requested equipment and services in other towns in the State of Maine;
  - d. Proof of insurance; and
  - e. A completed bid form detailing the cost to provide services.
6. The Town of Pittsfield reserves the right to reject any or all quotations, to waive any formality or technicality in the quotations, and to accept the quotation which is deemed to be in the best interest of the Town.
7. The successful bidder will be required to sign the Town’s Standard Services Contract.
8. Questions regarding this RFP can be sent to: [townmanager@pittsfield.org](mailto:townmanager@pittsfield.org). Answers will be shared with those who have sent previous questions to this email address.

## **TOWN OF PITTSFIELD**

### **1. SCOPE OF SERVICES**

#### **A. Background:**

The Town of Pittsfield is seeking quotations from qualified firms to digitally scan and index existing files in all Town Departments at the Pittsfield Municipal Building, and to propose and provide a document management software system. Proposals should include the cost of processing permanently retained documents housed in all Pittsfield Town Offices (Assessing; Building/Codes Enforcement to include Planning and Zoning; Finance, Town Clerk and Town Manager), Police Department, Fire Department, and all documents produced by Committees as well as two Town Safes.

A detailed scope of expected services and the desired proposal format is described herein. The Town reserves the right to accept or reject any and all proposals, and to select the proposal most advantageous to the Town of Pittsfield.

#### **B. Objective:**

The Town of Pittsfield is seeking document scanning services, such as scanning of paper files ranging in size from letter, legal and ledger, to oversized plans. The overall objective is to scan all eligible documents and store them in a digital format where they can be easily searched, retrieved and made available through some type of search and/or indexing system. This work is to be done in phases beginning with the files stored in the Assessing Department. The Town is interested in a document management system that would allow multiple users to share and work on documents and applications going forward. It is the Town's intent to require all future documents to be submitted electronically where possible. The Town intends to purchase a scanner and scan documents into the proposed solution moving forward. The Town has extensive files in a digital form, however, not every document being created now is in digital form. Proposers are encouraged to become familiar with the State of Maine law and archiving standards.

#### **C. Scope of Work:**

1. The Contractor will be responsible for providing offsite scanning services for documents and large format documents at an approved offsite scanning facility that is security compliant.

2. Offsite scanning will provide secure document shipping and handling from the Pittsfield Town Offices to their facility as well as returning documents to the Pittsfield Municipal Building.
3. The Contractor will maintain a tracking system to allow for retrieval of any document that is in process.
4. Document preparation includes, but is not limited to, straightening folded documents, removal of staples, binder clips or paper clips, removal of documents from binders or file folders and fasteners, or any other type of document retention fastener.
5. Documents will be returned in original order and folders.
6. Scanning of documents in PDF-A form.
7. The vendor will not scan blank documents.
8. Duplex scanning abilities
9. Image orientation recognition
10. Blank page orientation and deletion
11. OCR (Optical Character Recognition)
12. Index of all scanned documents. If there is a limit to the naming conventions and/or characters, please specify (i.e., up to four naming conventions or headings per file, such as Map/Lot, Name, Address, Date, up to 35 characters).
13. Store deliverable on a remote storage device or other appropriate approved media for delivery to the Town.
14. Propose a document management software system for going forward, if needed. List cost per user, and specify if system will reside on town server or be cloud based.
15. Provide cost of optional scanner for scanning documents into the system. Provide training of staff on equipment and related software.
16. Provide the annual software and equipment maintenance costs for three years.

**D. Document types and approximate quantity**

Paper files (letter, legal, ledger):

- Approximate pages: Unknown

Large format maps and plans:

- Approximate large format pages: Unknown

**The Town does not have an exact count of all documents, sizes and types. Interested bidders are strongly encouraged to request a site visit to view the documents that need to be scanned in order to prepare their own quantity estimates.**

**E. Proposal Submission:**

1. Include any services your business can offer to meet the requested scope of services, and any references from previous projects similar in scope.
2. Provide a lump sum cost based on the estimated quantities as well as unit or per page/document pricing.

Also provide a breakdown of costs for services to be included.

3. Include a breakdown of cost by department.
4. Provide a schedule/timeframe in which the contractor anticipates being able to perform the work, to include an estimation of the duration of time the project will take to complete.

**F. Proposal Format:**

The proposals shall include as a minimum the following information:

1. Transmittal letter: A cover letter affirming the consultant's interest in performing the services and confirming the primary contact person for the project.
2. Company Profile: A description of the firm's size, general qualifications, expertise, experience and services, particularly with respect to document scanning.
3. Project approach: A project scope and description of the consultant's understanding of the minimum requirements, and a summary and description of the tasks which will be performed.
4. Project team: A listing of the members of the proposed project team and the roles of each team member. Indicate the proposed project manager who will be in charge of the project and who will attend public meetings as needed.
5. Project Schedule: the level of effort anticipated for each task and the amount of time to accomplish the task.

6. References: Names, addresses and telephone numbers/email addresses of representatives of current or recent clients familiar with similar work performed by the firm.

7. Fee Summary: A fee table listing total man-hours proposed for each task, the hourly rate and total cost basis for the entire project. The selected firm shall be required to enter into the Town's standard services contract stipulated as a "Not to Exceed" fee.

Please also provide a cost estimate with the details required in Fee Summary to perform this work over both a two-year period and a three-year period.

8. Additional data: Any additional data the proposer considers essential and/or pertinent.

**G. Proposal Submittal Requirements:**

Each proposer shall submit eight (8) bound copies, one (1) unbound copy and one digital copy in .pdf format clearly marked: **RFP - Document Scanning and Record Management System**

Proposals must be delivered no later than 11:00 am on Thursday, October 20, 2022 to: Pittsfield Town Office, 112 Somerset Avenue, Pittsfield, Maine 04967. Proposals received after the deadline will not be considered. Faxed submittals will not be accepted. The names of all proposers will be read aloud publicly at the Pittsfield Town Offices at 11:00 am on Thursday, October 20, 2022. The Town of Pittsfield reserves the right to accept or reject any or all proposals, or parts thereof, and further, to make modifications as it deems are in the best interest of the Town. The Town also reserves the right to retain all proposals submitted, and to use any ideas included within a proposal, regardless of whether that proposal is the final selection. The Town further reserves the right to undertake such review of the proposals as it deems necessary to evaluate the qualifications of the respondents and to evaluate their proposals. The quoted price shall remain valid for a period of 90 days. The Town of Pittsfield will not be responsible for any costs incurred by proposers. Submission of a proposal indicates acceptance by the firm of the conditions contained within this Request for Proposals.

The Town of Pittsfield reserves the right to reject any or all submittals, to waive technical or legal deficiencies, and to accept any proposal that it may deem to be in the best interest of the Town.