

**TOWN OF GLASTONBURY
PROFESSIONAL SERVICES PROCUREMENT NOTICE
REQUEST FOR PROPOSAL
DOCUMENT MANAGEMENT SYSTEM AND
SCANNING SERVICES FOR EXISTING DOCUMENTS
RPGL-2017-09**

The Town of Glastonbury will be accepting proposals from qualified individuals or firms to provide a Document Management System and the necessary scanning services to convert to electronic media the paper based documents the Town now possesses. Interested individuals and firms should obtain the complete RFP and related information from Mary F. Visone, Purchasing Agent, 2155 Main Street, Glastonbury, CT 06033 or via the Town's website at www.glastonbury-ct.gov.

Proposals must be submitted to the Purchasing Agent no later than October 4, 2016 at 2:00 PM. **LATE PROPOSALS WILL NOT BE CONSIDERED.**

The Town reserves the right to waive informalities or reject any part of, or the entire proposal, when said action is deemed to be in the best interests of the Town. All Sealed proposals must be submitted to the Office of the Purchasing Agent no later than the time and date indicated.

An Affirmative Action/Equal Opportunity Employer. Minority/Women /Disadvantaged Business Enterprises are encouraged to bid.

Mary F. Visone
Purchasing Agent

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SECTION I – GENERAL INFORMATION

Background – The Town of Glastonbury has been compiling paper documents associated with multiple software programs and manual based systems for a number of years. For example: The Accounting Department uses the Tyler Munis system for handling finances and payroll. The Engineering Department creates documents in Autocad and stores these documents on Network Drives. The Human Resources Department maintains employee records in a manual file system. These departments are representative of over twenty departments, each with electronic and paper based records.

General Intent - It is the general intent to procure a Document Management System that can capture and organize these documents electronically in an efficient manner for quick and easy retrieval on an as needed basis by multiple authorized end users. The preference is to find one Document Management system that can interface with all the various software programs the Town now utilizes. It is important that the integration between the Document Management System and the various software programs work as seamlessly as possible to reduce the amount of work by Town staff to complete data input on a daily basis. Additionally this RFP seeks to acquire scanning services to assist in converting existing paper based documents to electronic documents with the necessary meta data input included in the scanning process.

This RFP is inclusive of a complete Document Management System the Town is seeking to implement. It is acceptable for respondents to respond to portions of the RFP, such as the Document Management System only or only the scanning process that will be required. Although preference will be given to proposals inclusive of all aspects of this RFP consideration will be given to responses to this RFP that address portions of the Scope of Services as outlined herein as long as the systems are compatible.

SECTION II – CONSIDERATIONS/CONSULTANT’S SERVICES

- Portions of the work may be performed by Town or other forces. The RFP shall identify where these conditions exist.
- All drawings, reports, data, and other documents prepared by the Respondent according to this Agreement shall be submitted to the Town for its review and approval. Resulting work products of the Respondent pursuant to this solicitation shall become property of the Town of Glastonbury.
- No such approval shall in any way be construed to relieve the Respondent of responsibility for technical adequacy or operate as a waiver of any of the Town’s rights under this Agreement. The Respondent shall remain liable to the Town according to applicable laws and practices for all damages to the Town caused by the Respondent’s negligent performance of any of the services furnished under this Agreement.

- The Respondent shall conduct regular meetings with the Town, and other appropriate parties, at a location established by the Town to review progress. The Respondent will provide written notes of each meeting to all attending parties before the next meeting.
- **The Town shall not be obligated to accept any proposal and the Town shall reserve the sole right to determine the appropriateness of any proposal for this work.**

SECTION III – ENVIRONMENT AND SCOPE OF SERVICES

HARDWARE AND SOFTWARE ENVIRONMENT

The Town of Glastonbury utilizes a VMWare environment with a Storage Area Network (SAN) for its server architecture. The Document Management System will be required to work in this environment. The Town network comprises three Dell Power Edge servers and a HP Storage Area Network. All of the Town's facilities, servers, and workstations are connected via a high speed network backbone using a fiber optic Ethernet network.

The Town maintains the Munis software environment, which is currently on version 10.5. On average the system is upgraded to the current version every eighteen months to two years.

Most other application environments are updated on an annual basis and are kept current with the recent versions of the applicable software.

The Town uses Microsoft office and email server products. The Microsoft office suite on the desktop computers is generally dependent on the computer and when it was purchased. Most computers are six years old or newer and would typically have the office product installed available at that time was installed. Currently all computers have Office 2007 or newer. The Exchange server is currently the 2013 version but is expected to be upgraded to the 2016 version by October 2016.

TECHNICAL REQUIREMENTS

The Document Management System needs to work within existing hardware resources presently used by the Town of Glastonbury including the network servers, Storage Area Network, Dell computer workstations, and various network scanners/copiers.

All Data files uploaded into the system must keep their original file format and must continue to be able to be accessed by the software that created the document. As files get updated by the primary software, prior versions of the files must be accessible for a reasonable period of time should it become necessary to revert back to prior versions of a file if the files are designed for updates. The following are the current file formats used by the Town:

-office formats: doc, docx, xls, xlxs, ppt, msg, pdf, pdfa

-CAD formats: dwg, esri

Files saved, scanned, or imported in formats that can be searched using text based searching such as Microsoft Word or Acrobat PDF are to be saved or archived in the system such that full text searches can be accomplished.

The system must utilize Active Directory to assign and maintain security permissions for all users and documents attempting to add documents or retrieve documents. The user interface should also utilize single sign on using Active Directory credentials to avoid a separate logon.

APPLICATION INTEGRATION REQUIREMENTS

The Town has several software applications that will require integration within the Document Management System to allow for direct import of documents with associated metadata and direct searches of the Document Management system from within the software application. The following software applications will require integration:

Tyler Munis: The **Munis** system creates Purchase Orders, Accounts Payable Checks, Payroll Checks, W2's, 1099's, and 1095's, all of which will need to be able to automatically upload into the Document Management System with the necessary metadata included without manual intervention. In addition, scanned or documents received via email such as invoices and packing slips will need to be integrated into the system with automatic generation of metadata as much as possible.

It is highly desired that the Document Management Data can be searched from within the Munis application and the appropriate data linked to the Munis records currently being accessed. An example would include that when in Purchase Order Inquiry associated invoices in the Document Management system can be accessed with a click of a button or similar process.

Building Permits are generated from the **View Permit** application and it would be desirable to have the permits automatically added to the Document Management system.

The Fire Department uses a system called **Firehouse**. It would be desirable for the Firehouse system to be able to automatically publish Incident Reports into the Document Management System with meta data automatically created.

The Town staff uses **Microsoft Outlook** for its email client. It is highly desired that an interface is added to Outlook for direct document import into the Document Management System.

SECURITY CONCERNS

The Town of Glastonbury prefers that any system be an onsite system rather than a cloud based system for both security and emergency preparedness reasons.

Due to the anticipated size of the system, include in the response information regarding the topology of the system with respect to how documents are stored. Are they stored within a database or kept in standard files with links?

It is preferable that the system be capable of encrypting documents for added security. For web based interfaces elaborate on penetration testing done to the system and if tests are redone for each major revision. Elaborate on input validation testing for search features of documents for each major revision.

Any web interfaces that interact directly with the World Wide Web must meet PCI and Town of Glastonbury Network security requirements up to and including monthly intrusion scanning.

DATA INPUT REQUIREMENTS

Data sources for the Document Management System generally come from four methods:

- Application Integration which is addressed in a previous section,
- Direct Import from email,
- Direct import from an existing electronic file, and
- Document scanning from the Town's copier fleet.

The Document Management system will need to have an add-in to Microsoft Office to allow for quick and easy import of documents from an email client using such technology as context menus with an easy or automated method for appending metadata as the scanning takes place.

Many documents are stored on network drives and each user has a private network folder, a departmentally shared network folder, and a Town wide shared network folder. Files in any of these environments need to be able to be easily moved into the Document Management System with an easy or automated method for appending metadata as the scanning takes place.

The Town of Glastonbury maintains a fleet of Ricoh and Canon copiers, all of which possess the capability for network scanning to email and network folders. The Document Management System needs to be able to utilize these devices for scanning documents into the system with an easy or automated method for appending metadata as the scanning takes place.

INFORMATION TAGGING

A metadata tagging system is desired to further index the documents for future retrieval and searching. At this point in time we have identified about 50 tags. These tags need to be easily linked to documents during input.

DATA RETRIEVAL AND UPDATE REQUIREMENTS

The Document Management system will need to have an easy to use interface for document search and

retrieval. The system should have complex multi-tiered search ability on multiple criteria. The interface should approximate a standard view similar to Windows File Explorer for ease in new user acceptance.

The Document Management System must allow the documents to be accessed by external systems such as GIS and have the remote systems provide search criteria so that only applicable matches are returned.

If possible the Document Management Interface should be able to include external information sources such as the Town Clerk Land Record System, QDS Tax system, The Vision Appraisal System, and the View Permit System for data searches. This would allow for more complete searches without recreating the data.

SCANNING SERVICES

The Town has reviewed the requirements for scanning services and has compiled a list of anticipated need. Due to the magnitude of the project the work may be divided into smaller work projects and encompass multiple years. Below is a partial list of the documents that will need to be scanned into the Document Management System. Included are examples of the metadata needed to be identified as part of the scanning process.

Note: The work listed below is rough approximations of the quantities of the work required and the general constraints used to gather these estimates are subject to change. These changes could increase or decrease the overall quantities of work to be performed.

FINANCIAL ADMINISTRATION/ACCOUNTING

The Financial Administration/Accounting Departments use MUNIS by Tyler Technologies. This application is responsible for the majority of the documents identified by this department to be added to the Document Management System. The MUNIS system generates purchase orders, accounts payable checks, payroll checks, 1099's, W2's, and 1095's. The Accounting Department also receives invoices from vendors for related purchase orders. Lastly the Accounting Department processes purchasing card transactions that include the submission of statements, expense reports, and receipts.

Document: Purchase Orders

Quantity Paper N/A

Quantity Electronic: 16,000

Date Range: 2010-present

Location: Munis Server

Indexes

1. Purchase Order Number
2. Vendor Name
3. Vendor Number
4. General Description
5. Fiscal Year

Document: Invoices

Quantity Paper: 16,000-24000

Date Range: 2010-present

Location: Accounting Files

Quantity Electronic: N/A

Date Range:

Location:

Indexes

1. Purchase Order Number
2. Invoice Number
3. Invoice Amount
4. Invoice Date
5. Fiscal Year

Document: Accounts payable Checks

Quantity Paper:

Date Range:

Location:

Quantity Electronic: 22,000

Date Range: 2010-present

Location: Munis Server

Indexes

1. Check Number
2. Purchase Order Number
3. Check Date
4. Invoice Number
5. Fiscal Year

Document: Payroll Checks and Deposit Advices

Quantity Paper:

Date Range:

Location:

Quantity Electronic: 90,000

Date Range: 2010-present

Location: Munis Server

Indexes

1. Check Number
2. Employee Number
3. Employee Name
4. Fiscal Year

Document: 1099's

Quantity Paper:

Date Range:

Location:

Quantity Electronic: 1,000

Date Range: 2010-present

Location: Munis Server

Indexes

1. Vendor Number
2. Vendor Name
3. Tax Id Number
4. Fiscal Year

Document: W-2's

Quantity Paper:

Date Range:

Location:

Quantity Electronic: 5,000

Date Range: 2010-present

Location: Munis Server

Indexes

1. Employee Name
2. Employee Number
3. Fiscal Year

Document: 1095's

Quantity Paper:

Date Range:

Location:

Quantity Electronic: 300

Date Range: 2015-present

Location: Munis Server

Indexes

1. Employee Name
2. Employee Number
3. Fiscal Year

Document: Purchase Card Statements

Quantity Paper: 4,000

Date Range: 2012-present

Location: Accounting files

Quantity Electronic:

Date Range:

Location:

Indexes

1. Employee Name
2. Vendor Name for Receipts
3. Statement Date
4. Fiscal Year

ASSESSOR

The Property Assessor Department stores much of their information in the Vision Appraisal system. Most data from that system is displayed as Field Cards for all the properties in Town. At this time there has been no request to store the field cards from the Vision System in the Document Management System, but there are old field cards stored electronically prior to the implementation of the Vision system that should be included in the document management system.

Document: Property Field Cards

Quantity Paper:

Date Range:

Location:

Quantity Electronic: 60,000

Date Range: 1960's-1990's

Location: Network Drives

Indexes

1. Parcel ID
2. Address
3. Property Owner's Name

COMMUNITY DEVELOPMENT/BUILDING

The Community Development and Building Departments have a significant amount of paper maps and documents, including years of permits.

Document: Community Development Maps/Drawings

Quantity Paper: 20,000 **Date Range:** 2005-present **Location:** Comm Dev Store Rm
Quantity Electronic: **Date Range:** **Location:**

Indexes

1. Address
2. Development Name
3. Developer Name

Document: Building Drawings

Quantity Paper: 60,000 **Date Range:** 1940-present **Location:** Plan Room and Files
Quantity Electronic: **Date Range:** **Location:**

Indexes

1. Address
2. Permit #
3. Contractor Name
4. Owner's Name

Document: Community Development Files

Quantity Paper: 20000 **Date Range:** 2005-present **Location:** Comm Dev files
Quantity Electronic: **Date Range:** **Location:**

Indexes

1. Address
2. Development Name
3. Developer Name
4. Owner's Name

Document: Building Permits and Files

Quantity Paper: 30,000 **Date Range:** 1940-present **Location:** Building files
Quantity Electronic: **Date Range:** **Location:**

Indexes

1. Address
2. Building Permit Number
3. Contractor Name
4. Owner's Name

ENGINEERING

The Engineering Department has a large cache of files related to projects and properties all over Town. These documents are both in paper and electronic form. Many of the electronic documents are maps. They are stored in a folder structure that organizes them. The metadata for many of the electronic documents are the file and folder names used to store the documents. The Engineering Department also issues various permits, mostly from the View Permit Application.

Document: Street and Project files

Quantity Paper: 300,000
Quantity Electronic: 100 gb

Date Range: 1960-present
Date Range: 1960-present

Location: Engineering files
Location: Engineering Server

Indexes

1. Address
2. Facility ID
3. Project ID

Document: Permits

Quantity Paper:
Quantity Electronic: 1000

Date Range:
Date Range: 2011-present

Location:
Location: Engineering Server

Indexes

1. Permit #
2. Address
3. Contractor
4. Owner

FACILITIES

Facilities has a number of building plans for all the Town buildings as well as files for various CIP projects.

Document: Building Drawings

Quantity Paper: 5,000
Quantity Electronic:

Date Range: 1960-present
Date Range:

Location: Facilities files
Location:

Indexes

1. Address
2. Facility ID
3. Project Name

Document: CIP Files

Quantity Paper: 50,000
Quantity Electronic:

Date Range: 1960-present
Date Range:

Location: Facilities files
Location:

Indexes

1. Address
2. Facility ID
3. Project Name
4. CIP GL Account

FIRE DEPARTMENT

The Fire Department has a significant amount of data in the form of Incident Reports, Equipment Reports, and Permits.

Document: Incident Reports, Equipment Reports, Permits

Quantity Paper: 50,000 **Date Range:** 2000-present **Location:** Fire Dept files
Quantity Electronic: **Date Range:** **Location:**

Indexes

1. Equipment ID for equipment
2. Incident ID for Incidents
3. Station # for Equipment, Address for Incidents and permits
4. Permit # for permits

FIRE MARSHAL

The Fire Marshal's office compiles information on every property and facility in Town. Most information is organized by address and includes permits, inspection reports, fire evacuation plans and drawings of each facility. Since 2010 most of the information has been stored digitally in folders on the network drive.

Document: Street address files

Quantity Paper: 330,000 **Date Range:** 1960-2010 **Location:** Fire Marshal files
Quantity Electronic: 26,000 **Date Range:** 2010 - Present **Location:** network drive

Indexes

1. Address
2. Owner
3. Incident #

HUMAN RESOURCES

Human Resources maintains all documentation on employees and employee related training activities.

Document: Employee Records

Quantity Paper: 100,000 **Date Range:** 1960-present **Location:** HR files
Quantity Electronic: 400 **Date Range:** Recent **Location:** Network Drive

Indexes

1. Employee #
2. Employee Name
3. Department
4. Job Position

HUMAN SERVICES

Human Services maintains records on various outreach programs such as Renters Rebate and Energy Assistance as well as clinical records for Senior Services. Human Services also runs the Community Center and maintains files for the facility rentals.

Document: Programs

Quantity Paper: 15,000 **Date Range:** 2005 - Present **Location:** Human SVS files
Quantity Electronic: **Date Range:** **Location:**

Indexes

1. Program name
2. Participant Name
3. Address

Document: Facility Rentals

Quantity Paper: 10,000

Date Range: 2005-present

Location: Human SVS files

Quantity Electronic:

Date Range:

Location:

Indexes

1. Renter Name
2. Rental Date
3. Rental ID

PARKS & RECREATION

The Parks and Recreation department has a large number of files related to seasonal staff they hire every year. In addition they have records on the various facilities that they maintain and oversee projects for.

Document: Employee Records

Quantity Paper: 50,000

Date Range: 2000-present

Location: Parks files

Quantity Electronic:

Date Range:

Location:

Indexes

1. Employee Name
2. Employee #
3. Job Position

Document: Facility Records

Quantity Paper: 50,000

Date Range: 1960-present

Location: Facilities files

Quantity Electronic:

Date Range:

Location:

Indexes

1. Address
2. Facility ID
3. Project Name

Document: Vendor Records – Parks & Recreation

Quantity Paper: 5,000

Date Range: 2000-present

Location: Parks files

Quantity Electronic:

Date Range:

Location:

Indexes

1. Vendor Name
2. Vendor # (Munis)
3. FIN (Federal ID Number)

POLICE DEPARTMENT

The Police maintains records for a variety of purposes, including Pistol Permits, Gun Transfers, and Arrest Records of convicted individuals.

Document: Pistol Permits

Quantity Paper: 37,000

Date Range: 2000-present

Location: Police files

Quantity Electronic:

Date Range:

Location:

Indexes

1. Name
2. DOB
3. Date Issued

Document: Gun Transfers

Quantity Paper: 10,000

Date Range: 2000-present

Location: Police files

Quantity Electronic:

Date Range:

Location:

Indexes

1. Name
2. DOB
3. Weapon Mfg
4. Date transferred

Document: Arrest Records of Convicted Individuals

Quantity Paper: 75,000

Date Range: 1990-present

Location: Police files

Quantity Electronic:

Date Range:

Location:

Indexes

1. Name
2. DOB
3. ID Information or Address

PURCHASING

Purchasing maintains a great deal of information on vendors, projects, bids, and RFP's.

Document: PO Supporting Documents

Quantity Paper: 16,000

Date Range: 2010-present

Location: Purchasing files

Quantity Electronic:

Date Range:

Location:

Indexes

1. Bid or RFP #
2. Project Name
3. Applicant or Vendor Name where applicable

Document: Vendor Records – Purchasing & Accounting

Quantity Paper: 10,000 **Date Range:** 2010-present **Location:** Purchasing files
Quantity Electronic: **Date Range:** **Location:**

Indexes

1. Vendor Number
2. Vendor Name
3. FIN (Federal ID Number)

TOWN MANAGER

The Town Manager creates various reports and correspondence on a regular basis and would benefit from having that information stored electronically for easy access.

Document: Reports and Correspondence

Quantity Paper: 140,000 **Date Range:** 1960-present **Location:** Town
Manager files

Quantity Electronic: **Date Range:** **Location:**

Indexes

1. Party Name
2. Report Name
3. Date
4. Subject
5. Various Information Tags

Document: Town Council Agendas and Minutes

Quantity Paper: 20,000 **Date Range:** 1960-present **Location:** Town Clerk Records
Quantity Electronic: 5,000 **Date Range:** 2008-present **Location:** TM Files or Website

Indexes

1. Description – Committee + Minutes, Committee + Agenda
2. Meeting Date

Note: would like files in pdf format and ability for full text search of documents

TOWN CLERK

The Town Clerks office has a large quantity of records that have already been scanned as tiff files. It is desired, that within the Document Management System, an index be created that would allow a search of the documents by address for the land records. In addition the system should include the ability to lookup records and display data from within the Document Management System that includes any applicable land records for an address searched.

The system in use by the Town Clerk is a system by New Vision Systems Corporation out of New Canaan, CT called Official Records.

PROJECT SUBMITTALS

- Monthly Report on Status of Document Management System deployment and application integration.
- Monthly report on status of the Scanning Project which would include what is complete, what is in process and an updated schedule of work to be completed.

PROJECT COORDINATION

The Respondent will work closely with the Town of Glastonbury Information Technology Manager through all phases of the project.

SECTION IV - SUBMISSION OF PROPOSAL

MINIMUM REQUIREMENTS

- Respondent shall submit detailed information on any proposed Document Management System(s). The information will include details on previous integrations of a Document Management System and other software systems presently used by the Town as identified in Section III. Please include screen shots where possible.
- Respondent shall demonstrate sufficient staff resources to perform the work including an assigned project manager to oversee this work and act as liaison to the Town. Respondent shall provide a list all proposed staff for this project & resumes.
- Respondent shall have demonstrated experience designing and installing similar Document Management Systems within the past five (5) years.
- Respondent shall have demonstrated experience providing similar scanning services to other similar organizations within the past five (5) years.
- A mandatory software demonstration of any proposed Document Management System will be required of those Respondents selected to continue in the interview process. This demonstration can be accomplished via WebEx. The demonstration must show live examples of any API (Application Program Interface) integration between the Document Management System and any Software currently used by the Town. Demonstrations of interfaces of systems used by the Town are desired.

TERM OF SERVICE / TIME FOR COMPLETION

The selected firm will be expected to commence services within 30 days of contract execution or on such other schedule as may be agreed to with the Town. The Town anticipates allocating up to 36 months for the project described herein. The procurement and installation of a Document Management system will be the first priority. The scanning work will concentrate initially with current documents and historical documents will be phased in over multiple years as budgeted amounts become available.

PROPOSAL INSTRUCTIONS

- By submitting a proposal, Respondent represents that he/she has thoroughly examined and become familiar with the Scope of Services outlined in this RFP and are capable of performing the work to achieve the Town's objectives.
- The awarded supplier may allow other Connecticut municipalities to "piggy-back" this RFP as allowed by their Town Code of Ordinance. While this clause in no way commits any other municipality to purchase from the awarded contractor, nor does it guarantee any additional orders will result, it does allow them, at their discretion, to make use of the Town of Glastonbury's competitive process (provided said process satisfies their own procurement guidelines) and purchase directly from the awarded contractor. All purchases made by other municipalities shall be understood to be transactions between that municipality and the awarded vendor. The Town of Glastonbury shall have no legal obligation or responsibility for any contracts/purchases between the vendor and any other municipality.
- All firms are required to submit a **clearly marked original** and seven (7) copies of their proposal to Mary F. Visone, Purchasing Agent, 2155 Main Street, Glastonbury, CT by the date and time listed in the proposal response page. All proposals will be opened publicly and recorded as received. Respondents may be present at the opening; however, there will be no public reading of Proposals. Proposals received later than the time and date specified will not be considered. The proposal must be submitted in a sealed envelope or package and the outside shall be clearly marked with the Firm's name and address and the following:

**PROFESSIONAL SERVICES PROCUREMENT NOTICE
REQUEST FOR PROPOSAL
Document Management System and Scanning Services
RPGL- 2017-09
October 4, 2016
TIME – 2:00 P.M.**

All respondents are required to submit the information detailed below. **Responses shall be organized and presented in the order listed below to assist the Town in reviewing and rating proposals.** Responses should be presented in appropriate detail to thoroughly respond to the requirements and expected services described herein.

1. Table of Contents to include clear identification of the material provided by section and number.
2. A letter of transmittal indicating the firm's interest in providing the service and any other information that would assist the Town in making a selection. This letter must be signed by a person legally authorized to bind the firm to a contract.
3. Name, email address and telephone number of person(s) to be contacted for further information or clarification.
4. Name and qualifications of assigned project manager and a list of staff members who would be involved with the project, including their assigned roles and a description of their background and experience. Resumes of same individuals shall be included.
5. A background statement including a description of relevant experience of the firm/individual submitting the proposal.
6. Respondent shall provide a list of 3-5 references and examples of previous similar projects successfully completed within the last five years with the contact name, address and telephone number of the owners' representative in each project. Experience shall demonstrate design, installation and scanning services.
7. Respondent shall submit detailed information on any proposed Document Management System(s). The information will include details on previous integrations of a Document Management System and other software systems presently used by the Town as identified in Section III. Please include screen shots where possible.
8. Fee Proposal – Pricing proposals shall include a breakdown by line item separately for Document Management System(s) and Scanning Services:
 - a. Document Management System (Detail by module if applicable)
 - b. Scanning Services – Standard paper size i.e. letter & legal
 - c. Scanning Services - Maps
 - d. Scanning Services – Indexing & Metadata Entry
9. Description of any exceptions taken to this RFP. If any proposal involves any exception from the stated requirements and specifications, they must be clearly noted as exceptions and attached to the proposal.

10. A concluding statement as to why the respondent is best qualified to meet the needs of the Town.
11. Proposal Response Form (**ATTACHMENT A**).
12. Respondent is required to review the Town of Glastonbury Code of Ethics adopted July 8, 2003 and effective August 1, 2003 and revised October 29, 2013 and effective November 28, 2013. Respondent shall acknowledge that they have reviewed the document in the area provided on the attached Ethics Acknowledgement form included on **ATTACHMENT A**. The selected respondent will also be required to complete and sign a Contractor Acknowledgement Form prior to award. The Code of Ethics and the Contractor Acknowledgment Form can be accessed at the Town of Glastonbury website at www.glastonbury-ct.gov. Upon entering the website click on the **Bids & Proposals Icon** which will bring you to the links for the **Code of Ethics** and the **Acknowledgement Form**. If the respondent does not have access to the internet, a copy of these documents can be obtained through the Purchasing Department at the address listed within this bid/proposal.
13. Statement of Non-Collusion (**ATTACHMENT A**).
14. The Town of Glastonbury is dedicated to waste reduction and the practice of using and promoting the use of recycled and environmentally preferable products. Respondents are encouraged to submit RFP responses that are printed double-sided (except for the signed proposal page) on recycled paper, and to use paper dividers to organize the RFP for review. All proposal pages should be secured with a binder clip, staple or elastic band, and shall not be submitted in plastic binders or covers, nor shall the proposal contain any plastic inserts or pages. We appreciate your efforts towards a greener environment.
15. Any technical questions regarding this RFP shall be made in writing and directed to Bobby Ashton, Information Technology Manager, 2143 Main Street Glastonbury, CT 06033 or by email at bobby.ashton@glastonbury-ct.gov with a copy to purchasing@glastonbury-ct.gov. For administrative questions concerning this proposal, please contact Mary F. Visone, Purchasing Agent, at (860) 652-7588, or by email at purchasing@glastonbury-ct.gov. All questions, answers, and/or addenda, as applicable, will be posted on the Town's website at www.glastonbury-ct.gov (Upon entering the website click on Bids & Proposals Icon, click on the Bid Title to view all proposal details and document links). **It is the respondent's responsibility to check the website for addenda prior to submission of any proposal.** Note: Responses to requests for more specific contract information than is contained in the RFP shall be limited to information that is available to all respondents and that is necessary to complete this process. The request must be received at least five (5) business days prior to the advertised response deadline.

Failure to include any of the above-referenced items in the submitted proposal may be grounds for disqualifying said proposal.

EVALUATION CRITERIA

- The Town of Glastonbury shall select the responsible and responsive Proposal which is determined by the Town to be the best suited, most advantageous, and provides the best value to the Town on the basis of the criteria included in this Request for Proposal. The Town expressly reserves the right to negotiate with the selected Proposer prior to an award of any contract pursuant to this RFP. Best value shall be determined by consideration of the following factors as deemed appropriate by the Town.
 - Accuracy, overall quality, thoroughness, and responsiveness to the Town's requirements as summarized herein.
 - The qualifications and experience of the firm, the designated account representative, and other key personnel to be assigned to the project.
 - Successful performance of similar work within the last five (5) years including demonstrated integration with Town systems described.
 - Technical Solution/Approach to Project.
 - Fee Proposal.
 - The number, scope, and significance of conditions or exceptions attached or contained in the proposal.

SELECTION PROCESS

- This request for proposal does not commit the Town of Glastonbury to award a contract or to pay any costs incurred in the preparation of a proposal to this request. All proposals submitted in response to this request become the property of the Town of Glastonbury. The Town of Glastonbury reserves the right to accept or reject any or all proposals received as a result of this request, to negotiate with the selected respondents, the right to extend the contract for an additional period or to cancel in part or in its entirety the request for proposals, if it is in the best interests of the Town to do so.
- A Selection Committee, appointed by the Town Manager, will evaluate all proposals received for completeness and the respondent's ability to meet all requirements as outlined in this RFP. The Committee will then short list the specific firms whose proposals best meet all criteria required and may conduct interviews with these firms. Upon completion of interviews, the Selection Committee will forward to the Town Manager, a list of firms recommended for further consideration.

- Based on the results of the interview process, the Town Manager will review the Scope of Services, fee proposals, and other factors with the top-rated firm(s) and negotiate a specific agreement based on these discussions.
- Additional technical information may be requested from any respondent for clarification purposes, but in no way changes the original proposal submitted.

TIMELINE

The Town intends to adhere to the schedule listed below as closely as possible, but reserves the right to modify the schedule in the best interest of the Town as required.

Publicize RFP	September 15, 2016
RFP Due Date	October 4, 2016 @ 2PM
Shortlist of Proposals Received	October 7, 2016
Software Demonstrations with Top Respondents	Mid/Late October
Fee Proposal and Scope of Services	November
Contract Effective Date	December 1, 2016

INSURANCE REQUIREMENTS

INSURANCE

The Respondent shall, at its own expense and cost, obtain and keep in force during the entire duration of the Project or Work the following insurance coverages covering the Respondent and all of its agents, employees and sub-contractors and other providers of services and shall name the **Town of Glastonbury and its employees and agents as an Additional Insured** on a primary and non-contributory basis to the Respondent's Commercial General Liability and Automobile Liability policies. All policies should also include a Waiver of Subrogation in favor of the Town. **These requirements shall be clearly stated in the remarks section on the Respondent's Certificate of Insurance.** Insurance shall be written with insurance carriers approved in the State of Connecticut and with a minimum Best's Rating of A-VIII with all policies written on an occurrence form basis. In addition, all carriers are subject to approval by the Town. Minimum Limits and requirements are stated below:

1) Worker's Compensation Insurance:

- Statutory Coverage

- Employer's Liability
- \$500,000 each accident/\$500,000 disease-policy limit/\$500,000 disease each employee
- A Waiver of Subrogation shall be provided in favor of the Town of Glastonbury and its employees and agents.

2) Commercial General Liability:

- Including Premises & Operations, Products and Completed Operations, Personal and Advertising Injury, Contractual Liability and Independent Contractors.
- Limits of Liability for Bodily Injury and Building Damage
Each Occurrence \$1,000,000
Aggregate \$2,000,000 (The Aggregate Limit shall apply separately to each job.)
- A Waiver of Subrogation shall be provided in favor of the Town of Glastonbury and its employees and agents.

3) Automobile Insurance:

- Including all owned, hired, borrowed and non-owned vehicles
- Evidence of Combined Single Limit of Liability for Bodily Injury and Building Damage:
Per Accident \$1,000,000
- A Waiver of Subrogation shall be provided in favor of the Town of Glastonbury and its employees and agents.

4) Professional Liability:

- \$1,000,000 Occurrence/\$1,000,000 Aggregate

5) Data Breach Liability:

- \$1,000,000 Occurrence/\$1,000,000 Aggregate

6) Errors and Omissions Liability or Professional Services Liability Policy

- Provide Errors and Omissions Liability or Professional Services Liability Policy for a minimum Limit of Liability \$1,000,000 each occurrence or per claim. The awarded respondent(s) will be responsible to provide written notice to the Owner 30 days prior to cancellation of any insurance policy.
- The respondent agrees to maintain continuous professional liability coverage for the entire duration of this Project, and shall provide for an Extended Reporting Period in which to report claims for seven (7) years following the conclusion of the Project.

The respondent shall provide a Certificate of Insurance as "evidence" of General Liability, Auto Liability including all owned, hired, borrowed and non-owned vehicles, statutory Worker's Compensation and Employer's Liability and Professional Services Liability coverage.

The respondent shall direct its Insurer to provide a Certificate of Insurance to the Town before any work is performed. The awarded Respondent(s) will be responsible to provide written notice to the Owner 60 days prior to cancellation or non-renewal of any insurance policy. The Certificate shall evidence all

required coverages including the Additional Insured on the General Liability and Auto Liability policies and Waiver of Subrogation on the General Liability policy. The respondent shall provide the Town copies of any such insurance policies upon request.

INDEMNIFICATION

To the fullest extent permitted by law, the Respondent shall indemnify and hold harmless the Town of Glastonbury and their respective consultants, agents, and employees from and against all claims, damages, losses and expenses, direct, indirect or consequential (including but not limited to fees and charges of engineers, attorneys and other professionals and court and arbitration costs) arising out of or resulting from the performance of the Respondent's work, provided that such claim, damage, loss or expense is caused in whole or in part by any negligent act or omission by the Respondent, or breach of its obligations herein or by any person or organization directly or indirectly employed or engaged by the Respondent to perform or furnish either of the services, or anyone for whose acts the Respondent may be liable, regardless of whether or not it is caused in part by a party indemnified hereunder.

As to any and all claims against the Town or any of its consultants, agents, or employees by any employee of the Respondent, by an person or organization directly or indirectly employed by Respondent to perform or furnish any of the work, or by anyone for whose acts Respondent may be liable, the indemnification obligation stated herein shall not be limited in any way by any limitation on the amount or type of damages, compensation, or benefits payable by or for Respondent under worker's or workman's compensation acts, disability benefit acts, or other employee benefit acts.

The above insurance requirements are the Town's general requirement. Insurance requirements with the awarded respondent are subject to final negotiations.

