

Request for Proposal (RFP)  
For  
Laserfiche scanning services  
For the City of Saratoga



Due Date: May 19, 2010

Respond to:  
City of Saratoga  
Attn: Kristin Borel  
13777 Fruitvale Ave.  
Saratoga, CA 95070

**TO :** All interested parties.

**SUBJECT:** RFP to implement scanning services for documents, compatible with Laserfiche, for the City of Saratoga.

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## **SECTION 1: INTRODUCTION**

The City of Saratoga has a population of 30,000 and is located in Santa Clara County, 10 miles southwest of downtown San Jose, and 50 miles south of San Francisco.

In 1999, the City of Saratoga implemented a program converting documents from paper to digital images and purchased the LaserFiche program for retrieval. The City had previously been scanning its permanent records to microfiche. Several departments regularly scanned documents, but some have old original files that require scanning. The City has had documents scanned by other companies, however those contracts have expired.

## **SECTION 2 : PROJECT DESCRIPTION**

The City of Saratoga is seeking scanning services compatible with LaserFiche for documents, maps and plans in the City's archive and for on-going scanning services. The City has a backlog of original files and plans dating from the 1960's to the present. There are approximately 35 boxes of archive documents, 40 boxes of current documents, and 7000 plan sheets that require scanning. We will also produce a bi-monthly output of materials for scanning. We anticipate that this backlog of documents will be sent out in batches over a negotiated period of time.

### **TIMELINE:**

Following are key dates for this RFP. The city reserves the right to make modifications. Changes to the schedule will be posted on our website. [www.saratoga.ca.us](http://www.saratoga.ca.us)

- Issue RFP – 04/29/2010
- Vendor questions due – 05/10/2010
- Responses to Vendor questions posted -05/13/2010  
<http://www.saratoga.ca.us/services/scanningrfp.asp>
- Proposals due –05/19/2010 by 5 pm
- Selected Vendor Interviews – 06/02/2010
- Vendor selection/staff recommendation – 06/07/2010 (Decision pending final City council approval on 06/16/2010)
- Scanning begins -07/01/2010

## SECTION 3 : SCOPE OF WORK

The City will require consultant services which include, but are not necessarily limited to:

- Retrieve and transport records identified by the City to the Contractor's facility and convert the records to a Laserfiche format (TIFF) at 300 DPI for letter size documents and 400 DPI for maps/plans.
- Preparation of documents for scanning, including: removal of staples, clips, and bindings, removal of sticky notes on front page, and unrolling of maps.
- Scanning of images at designated DPI. (Could be higher than 300).
- Special handling and scanning of older or degraded files and plans.
- Creation of CD masters and duplicates.
- All documents will be returned to the City with the CD masters. Originals to be returned in same sequence/bundles as when they were sent.
- Metadata to be filled out as indicated by criteria sent with boxes.
- Pre-set templates are to be used and will be sent to you as a "briefcase" from Laserfiche.
- Detailed invoicing to different departments within the City based on department-generated scanning requests.
- Using City-provided naming conventions .
- All documents are to be OCR'd before CD masters are returned.

## SECTION 4 : SUBMITTAL REQUIREMENTS

### 4.1 Response Submission

In order to facilitate the analysis of responses to the RFP, vendors are required to prepare their proposals in accordance with the instructions outlined in this RFP. Vendors who deviate from these instructions may be considered non-responsive and may be disqualified at the discretion of the City. Proposals should be prepared in a concise manner and provide sufficient detail and description of the vendor's capabilities to satisfy the requirements of this RFP. A proposal shall constitute an irrevocable offer for 90 days following the deadlines for its submission. All proposals will be confidential until selection of a vendor or final rejection of all proposals by the City Council at which time all proposals will be public information.

- **Three (3)** hard copies of the proposal and an electronic copy on a CD must be received by 5:00 pm on 05/19/2010. Proposals must include a scan of the documents provided in the envelope provided with this RFP packet. A CD with our templates is included with the documents. Also included is "Instructions for Scanning". Please follow these instructions. Letter size documents are to be scanned at 300 dpi and the maps/plans are to be scanned at 400 dpi. Scans are to be saved in a separate folder on the CD and submitted with your response. All originals are to be returned to the City of Saratoga with your proposal.

Please submit proposals to:

City of Saratoga  
Attn: Kristin Borel  
13777 Fruitvale Ave.  
Saratoga, CA 95070

Proposals received after 05/19/2010 after 5 pm will not be accepted and will be destroyed. Proposals will not be accepted via fax or e-mail.

#### **4.2 Proposal Format**

Responses to this RFP must include a cover page and a signed letter of transmittal followed by a table of contents. Proposals must be organized into the following major sections and provide sufficient detail for the City of Saratoga to make an informed decision and comparison of proposals. Emphasis should be given on accuracy, completeness, and clarity of content. Additional information such as marketing brochures and promotional materials may be included but must be at the end of the proposal in an appendix.

##### **I. Executive Summary**

A brief narrative not to exceed one page, describing the proposed work.

##### **II. Company Background**

Provide company background information including description of products and services and company history. Responses should address the following items and may include other information that the vendor believes would be relevant to the City in light of the information in this RFP.

- Company History
- Product Focus
- Employees
- Years in Business
- Key Partnerships and Alliances
- Government Contracts (e.g. CMAS, GSA)
- Familiarity with Laserfiche, AIIM Recommended Practices, and laws governing electronic records management
- Vendor Offices/Locations
- Number of Customers
- Number of Customers proportional to our size of organization
- Number of public agency Customers
- A description of the project team
- Resumes of key project members
- Name, address, email, and telephone number of the person to whom correspondence should be directed

### **III. Proposal**

A detailed price list including, but not limited to:

- Scanning letter and legal size documents
- Scanning large and extra large format documents
- Scanning microfiche in 16 and 32 formats
- Scanning of color documents
- Document preparation
- Document indexing
- Special handling
- OCR
- Emergency/Urgent Retrieval
- Color vs Black/white scans
- Creation of CD masters and duplicates
- Transportation – pick-up and delivery
- Document storage and destruction
- Any other applicable charges
- Credits for documents that are not properly scanned

Include scans of the documents provided in the RFP packet. Letter size documents are to be scanned at 300 dpi and the maps/plans are to be scanned at 400 dpi. Scans are to be saved on a CD and submitted with your response. All originals are to be returned to the City of Saratoga with your proposal.

A copy of the standard services agreement is attached. Include in your proposal a scope of work payment schedule together with any comments on the form of the agreement.

### **IV. Client References**

Proposal must include a minimum of three (3) references for directly applicable projects preferably with California cities or other public agencies comparable to the City of Saratoga. References should include an overview of the solution provided including hardware and software components. Additional references are allowable if the vendor chooses. Include the contact person who was directly responsible for overseeing the implementation/completion for each of the referenced projects. Proposals must include the name of the client/agency, contact information (name, phone number and/or email address) and the dates the services were provided.

#### **4.3 Selection Criteria**

Proposals will be evaluated based on the following criteria:

- Clarity of Proposal
- Demonstrated success in similar projects; particular attention will be paid to proposals from businesses with experience implementing Laserfiche scanning for municipalities
- Responsiveness of the proposal to the City's objective and scope of work

- The technical ability, capacity, and flexibility of the proposer to perform the scope of work
- Total cost of proposal

City Staff will review all proposals, and will seek approval from the City Council for the vendor that City staff determines has demonstrated the best proposal.

#### **4.4 Discretion and Liability Waiver**

The City reserves the right to reject all proposals or to request and obtain, from one or more of the businesses submitting proposals, supplementary information as may be necessary for City staff to analyze the proposal. The City may require proposers to participate in additional rounds of more refined submittals before the ultimate selection of a vendor is made. These rounds could encompass revisions of the submittal criteria in response to the nature and scope of the initial proposals. The City may negotiate with one or more firms, and may contract with one or more firms as the City deems appropriate.

By submitting a response to this RFP, proposers waive all right to protest or seek any legal remedies whatsoever regarding any aspect of this RFP. Although it is the City's intent to choose the most qualified proposal, the City reserves the right to reject all or choose any number of qualified proposals.

#### **4.5 Proposal Inquiries**

All questions regarding this RFP should be directed to Kristin Borel at [kborel@saratoga.ca.us](mailto:kborel@saratoga.ca.us). Please submit any questions on or before 5:00 p.m. 05/10/2010. No later than 5:00 p.m on Monday, May 13 the City will post responses to all questions received on the City website at [http://www.saratoga.ca.us/services/bid\\_questions\\_responses.asp](http://www.saratoga.ca.us/services/bid_questions_responses.asp). The identity of the vendor asking the question will not be posted. The City does not expect to respond to inquiries received after May 10, 2010; in the event that the City chooses to respond to such inquiries, however, it will post the responses on the City website.