



**Town of Lake Placid
Request for Proposals (RFP)
#2022-03
For
ELECTRONIC DOCUMENT
AND
RECORDS MANAGEMENT SYSTEM (EDRMS)
WWW.LAKEPLACIDFL.NET**

Overview:

The Town of Lake Placid, Florida (hereafter referred to as “Town”) is soliciting responses to this Request for Proposals (RFP) from experienced, responsible, and qualified vendors for the purchase of a Document Management System, including all software and related services for the setup, installation, training and implementation of that system.

The Town seeks a Document Management System to more efficiently and effectively deliver services to our staff and citizens. The initial departments to utilize the system will be the Town Clerk’s Office, Finance, Police , Planning and the Utility Departments. We plan to use this system town wide, as the needs arises, so this is an evolving process, and additional licenses should be available for purchase in the future.

The Town is seeking a vendor that has considerable experience in document management solutions and approach. The Town anticipates that experienced and qualified vendors will be able to offer standardized solutions and other cost-efficiencies favorable to the Town in order to keep costs at a minimum and allow the Town to achieve many of the primary requirements within the given budget. Proposals for this system should be submitted by August 11, 2022 as detailed herein.

PROJECT GOALS:

To procure and implement:

1. A system which meets the requirements of the RFP and which can demonstrate the ability to meet the future needs of our organization and community. The ideal vendor will demonstrate an ability to stay current with emerging technologies and have a vision of how to implement a unified electronic document management system that will eventually include or appropriately reference all electronic records including database applications, e-mail, and web content.
2. A proven, advanced Document Management System (DMS), which provides electronic capture, management, collaboration, storage, preservation and delivery of records and electronically stored information to users in the Town organization and to citizens via web access.
3. A system, which automatically shares relevant information between existing applications and modules so that users are able to cross-reference disparate information more efficiently.
4. A system that creates a single knowledge base regardless of where the information was first captured or with which application it is associated.
5. A system which incorporates consistency in the design of the user interface and the operation of the system across the various applications, so as to minimize the user's learning curve and make overall use easy.
6. A system which is secure, highly reliable and which can demonstrate superior data integrity, which ensures the timely recording and delivery of information.
7. A system that meets all requirements of the State of Florida public records retention laws.

FUNCTIONAL REQUIREMENTS

The vendor will provide information and cost estimates about how it can implement a technical solution for the document and records management needs of the Town of Lake Placid. The Town is looking for a configurable, scalable system that can identify access, manage and preserve or interface with information throughout the organization, across systems, program and media, and which:

1. Electronically manages all digital records throughout their lifecycle, including word processing documents, spreadsheets, presentations, electronic forms, scanned images, maps, e-mails and other electronic

- documents.
2. Synchronize users and groups from objects in Active Directory to facilitate integration.
 3. Provide multiple layers of security to limit access at system, department, user, file, and function levels.
 4. Interface with existing business applications (Exhibit A). The information in Exhibit A is intended to give the potential provider a general understanding of the Town's software environment, so the proposer can understand the applications and describe their approach to managing the type of electronic records created by these systems.
 5. Has the flexibility to maintain document content, context, and structure according to Florida retention requirements.
 6. Create a detailed permanent audit log of all actions performed on a document including user and time stamp.
 7. Provide the ability to maintain previous versions of a document in the event that a rollback is required.
 8. Provide ability to attach document directly to outgoing e-mails using Microsoft Outlook, and Gmail.
 9. Single point of control over all information assets throughout their life cycles.
 10. Enable collaboration between multiple staff members to review and edit the same file simultaneously.
 11. Quickly and easily, access, add, and update information to file folders, regardless of format.
 12. Ability to capture, store, retrieve and reproduce irregular-sized (e.g., larger than 8½ x 11) documents.
 13. Automate filing, indexing, and processing.
 14. Support batch barcode and patch code recognition for automatic document separation when processing large numbers of documents.
 15. Support full text OCR recognition.
 16. Automate document workflow.
 17. Flexible and powerful search capabilities with full text search capabilities.
 18. View only access to information for staff.
 19. Utilize web portals for citizens to view information.
 20. Support multifunction copy/printer/scanners.

Optional features are:

1. Provide electronic signature capture and management.
2. Provide ability to send secured links for documents directly from view to partners, suppliers, or customers in lieu of sending documents as unsecured e-mail attachments.
3. Capture and index iSeries spool files automatically.

SUBMISSION ELEMENTS AND FORMAT

Please address the following points in your proposal. Include any major or minor items of information, even if not specially requested that would normally be provided with proposals. Responses must include, but are not limited to, the following information and shall be organized in the following order:

1. Provide a complete description of your company, including:
 - a. Number of years in business
 - b. Number of full-time employees and technical support personnel
 - c. Contact information, telephone numbers, mailing address, e-mail address, website
 - d. What percentage of company sales are attributed to electronic document management solutions
 - e. Describe internal performance metrics used to quantify key customer support responsiveness, such as: issues resolved on first call, average call duration
2. References-please include references for some current customers, including some government clients that are using the system.
3. Describe recent product enhancements and normal schedule for enhancements.
4. Provide a price schedule that clearly identifies the following prices for the base system being proposed:
 - a. Software licensing structure, priced with concurrent users:
 - i. 5 users
 - ii. 10 users
 - iii. 15 users
 - b. Licensing requirements for viewers utilizing the software.
 - c. Training.

- d. Hardware costs or required hardware configuration.
- e. Annual software maintenance costs for five years.

5. NO BIDS WILL BE RECEIVED BY EMAIL

- 6. Any additional fees explicit in listing and describing any services or items not covered in the proposal amount.
- 7. The necessary software and/or hardware, any integration needs and potential costs necessary to maintain the document management system.
- 8. Identification of any additional project components to keep current with technological advances that would improve the quality of the document management system.

Vendors are asked to respond to this RFP by submitting three (3) paper copies of the written proposal in an “8 ½ x 11” format. The proposal submittal packet shall be placed in a sealed envelope and clearly marked “Document Management System” on the exterior of the packet. The written proposals must be received no later than 2 p.m., EST, on Tuesday, August 11, 2022, at the address below:

Submit proposals to
Town Clerk Eva
Cooper-Hapeman
Town of Lake Placid
1069 US Hwy 27 N
Lake Placid, FL 33852

*Vendors should ensure that their proposals arrive at the correct location on or before the stated deadline.

*** At least two Florida reference sources are required from government agencies currently using the software submitted for consideration.**

*Late proposals or proposals delivered to the incorrect location will be disqualified from further consideration.

*No oral, telephone, fax or email proposals will be considered.

*No costs associated with the preparation of this proposal, or incurred in any manner by the proposer, may be charged to the Town.

*All materials submitted in response to this RFP will be considered the property of the Town.

EVALUATION CRITERIA AND SELECTION PROCESS

EVALUATION AND INTERVIEW: The Town's Document Management Selection Committee, consisting of Town staff from a variety of departments, shall review all proposals based on the vendor's qualifications and project characteristics, as well as submittal requirements set forth in the RFP. The committee will select finalists deemed best suited to address the needs of the Town based on the proposals received. The finalists will be notified in the week of, via e-mail.

The Town reserves the right to require any vendor to clarify its proposal or to request any additional information deemed necessary to assist staff in the evaluation of the proposal.

SELECTION:

Upon selection, final contract amount will be subject to negotiation to determine exact scope of services to be provided. Selection does not guarantee award of contract.

The Town Council will have the ultimate approval of the selection.

ADDITIONAL CONDITIONS

GENERAL PROVISIONS

- All information contained in this RFP is subject to modification or amendment by the Town.
- It is in the intent of the Town to enter into a not-to-exceed contract with the qualified vendor.
- The Town reserves the right to reject any and all proposals, to accept in whole or in part, to use any ideas in a proposal regardless of whether that proposal is selected, to waive any formality in proposals received, to cancel or modify the RFP in part or its entirety, and to accept proposals separately or combine proposals when it is in the best interest of the Town.
- All material submitted regarding the RFP becomes the property of the Town and will only be returned at the Town's option.

- The Town is not liable for any cost(s) incurred by any vendor prior to the issuance of an agreement or contract. Any cost(s) incurred may not be charged as a separate charge or as part of the services provided.
- Quotation of fees and compensation shall remain firm for a period of at least 90 days from the RFP submission deadline.

*All questions regarding the RFP should be directed in writing to Eva Cooper Hapeman at clerk@mylakeplacid.org no later than July 29, 2022. A complete list of all questions and answers will be sent via e-mail to all recorded holders of the Request for Proposal if a substantive clarification is necessary.

All proposals will be considered; however, an in-house server-based solution capable of cloud and manual backup is preferred. The Town of Lake Placid shall retain ownership of all data entered and if the software is based on a proprietary foundation the Town will be afforded a means of viewing and editing same in the event any licenses are discontinued.

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Exhibit A

Microsoft Outlook

American Data Group Billing and Financial Software Systems

Municode.com – Code of Ordinances