

Town of Ontario
Request for Quotation from Preferred Source Vendor
Document Conversion and Access Services
February 14, 2020

The Town of Ontario, located in Wayne County, NY, is requesting quotations from qualified vendors for (1) records imaging through scanning, (2) records indexing, (3) assistance in purchasing and adopting new records management software; (4) integration of newly scanned records into such software system; (5) assistance in purchasing and adopting a new electronic tablet and mobile software; and (6) development and documentation of Town records management policies, plans, and training procedures. This project seeks to (1) convert paper building, zoning, and permit records to archival digital format with proper indexing, and (2) improve the Town's ability to manage and access all records for all departments. Project details are listed below.

Vendors may respond to the entire scope of work or portions thereof, but must clearly indicate any scope items that they elect to not respond to. In your response please include your fee schedule, itemized cost estimate with per-image costs, and company qualifications specific to each item in the scope of work. If you have any questions, please contact Brian Smith at (315) 524-7170 x300.

Please submit responses to Brian Smith by February 26th, 2020 via email at: codeofficer@ontariotown.org.

PROJECT REQUIREMENTS

Scope of Work:

The Town of Ontario seeks qualified vendor(s) to undertake the following tasks:

- (1) Convert the Town's paper building, zoning, and permit records to digital format through scanning. This task must include all necessary document preparation, including culling, removing fasteners, etc., and organizing the files to vendor preference. Any hand marking on the file folders will be scanned by the vendor. The Town will maintain a database of files to manage the exchange of records with the vendor.
- (2) Index the newly digitized records in accordance with the framework of the Town's existing records management system (including by property address).
- (3) Assist the Town in purchasing and adopting electronic records management software. (If responding to this scope item, quoted fees must include any costs associated with this task, including one year's worth of initial software fees.)
- (4) Integrate (upload) the newly digitized records into the Town's electronic records management software system. (If responding to this scope item, quoted fees must include any additional software fees associated with this task.)
- (5) Assist the Town in purchasing one Samsung Galaxy Tab S5e tablet with cover keyboard, as well as one initial (one-year) software license. (If responding to this scope item, quoted fees must include any costs associated with this task, including any hardware, software and installation fees.)
- (6) Develop and document Town records management policies, plans, and training manual, including procedures for use of newly adopted records management software;

for this task, the vendor will address all records managed by all Town departments, and will provide one on-site training and consultation session.

Conformance with NYS Archives Guidelines:

In implementing this scope of work, the vendor will follow all relevant New York State Archives' publications including but not limited to:

- Records Retention and Disposition Schedule MU-1
- Publication 00: Digital Imaging Guidelines (2019 update)
- Publication 42: Guidelines for Off-site Storage of Inactive Local Government Records
- Publication 63: Guidelines for Choosing Records Management Software
- Publication 77: Managing Imaging and Micrographics Projects
- Publication 40: Fundamentals of Managing Local Government Archival Records
- Publication 49: Administration of Inactive Records
- Publication ADV09.01: Using a Data Storage Vendor
- Publication ADV19.01: Quality Control and Content Verification of Digital Images

This RFQ incorporates by reference the generic guidelines for imaging contained in these documents, with clarification provided herein. If the products produced in the project do not meet the specification, the vendor must immediately redo the appropriate portion of the project at its own expense.

This RFQ also incorporates by reference the 2020-2021 guidance for the Local Government Records Management Improvement Fund (LGRMIF). This project is the subject of an application for funding to the LGRMIF. If the project receives the LGRMIF funding, the vendor will be expected to strictly follow the timelines and requirements specified by the LGRMIF program.

This RFQ also incorporates by reference Records Retention and Disposition Schedule MU-1, last revised in 2003.

Records to be addressed in this project are:

The records to be scanned and indexed are building, zoning, and permit records, totaling approximately 307,000 standard-size documents and 4,300 maps and stored as follows:

- Building Department files: 20 file cabinet drawers, 25 folders per drawer avg. 40 pages per folder. Mainly 8 ½ x 11 with 1 to 3 maps per property (est. 95,000 images)
- Maps: estimated 4,300 (cabinets and basement)
- Zoning Board files: 20 drawers with estimated 90,000 images
- Building permits: 20 drawers with estimated 90,000 images
- Additional permits: 8 drawers with estimated 32,000 images

Timeline:

This project will be phased to maximize efficient flow of operations. The vendor will pick up and deliver the document in up to three batches in accordance with a schedule to be established prior to beginning work. The total project will take the Town one year, but the scanning portion will be allocated three to four months. Kickoff will be determined by the NYS Archives award schedule for the 2020-2021 LGRMIF grant program.

Inspection:

The Vendor will perform technical inspection in accordance with the above referenced NYS Archives specifications. The Town will also oversee content and quality control inspections of digital images. The Vendor will address errors in a timely manner.

Return of Records:

The original records will be returned to the Town in a timely manner according to a pre-arranged schedule.