



CITY OF LOMA LINDA

INFORMATION SYSTEMS DEPARTMENT

Request for Proposals for

Document Management System Software and Implementation Services

City of Loma Linda
25541 Barton Rd.
Loma Linda, CA 92354

Inquiries

Inquiries about this Request for Proposal must be in writing and directed to:

Barbara Nicholson
City Clerk
City of Loma Linda
25541 Barton Rd.
Loma Linda, CA 92354
Phone: (909)799-2819
E-mail: Brnicholson@lomalinda-ca.gov

1.0 GENERAL INFORMATION:

Terms of Use:

This RFP is not a contract offer. Receipt of a proposal neither commits the City of Loma Linda to award a contract to any vendor, nor limits our rights to negotiate in our best interest. The City of Loma Linda reserves the right to contract with a vendor for reasons other than price. Failure to answer any questions in this RFP may subject the proposal to disqualification. The City of Loma Linda reserves the right to request additional information that is necessary and pertinent to the project or to assure that the vendor's adequate competence to perform according to bid specifications. Products and services which are not specifically requested in the RFP but which are necessary to provide the functional capabilities proposed by the vendor shall be included in the proposal.

1.1 Background Information

The City of Loma Linda is looking to improve records management, retention, indexing, work flow, document access and retrieval of documents created and utilized by city staff and citizens. The goal is to implement a system that stores digital images quickly and effectively for later retrieval by securely defined user or group access. The City does not currently use a Document Management System; however, many departments already maintain their records electronically. The City is looking to take the paper documents that will be archived for a specified period of time and scan them into a document management system. The system shall include document imaging, management, indexing, searching, workflow and document archiving/retention. The system should support archival permanency with the ability to migrate records to other mediums (hardware or software) for the full retention of a record. The system must be able to export the digital information into various formats, and to allow quick, easy, and timely retrieval of records and information as needed. The system should have the ability to control the authoring, check in/out, and/or version control of documents being developed, managed or stored. It should also give users the ability to index or enter the "metadata" associated to the documents being entered into the system.

The City is seeking experienced, qualified, and professional vendors to contract services for Document Management System Software and Implementation Services. The vendor shall provide software implementation, data conversion services, user training and manuals, and offer on-going technical support, software upgrades and annual maintenance.

The Request for Proposal (RFP) is intended to solicit services for the purchase and implementation of Document Management System (DMS) Software, data conversion services, user training and technical support, software upgrades and annual maintenance capabilities.

All qualified management companies are invited to submit proposals under this RFP.

Tentative RFP Schedule (Subject to change at City's discretion)

	Milestone	Date & Time
1	RFP Release	11/16/21 12:00 PM
2	Submission Deadline	12/02/21 3:00 PM
3	Vendor Evaluation, Negotiations, & Selection	12/06/21 -12/09/21
4	Submittal to City Council	12/14/21 7:00 PM

1.2 Submittal Requirements

The deadline for RFP responses is **December 2, 2021 3:00 PM PST** submit one signed copy of the RFP response as a PDF or word file to bnicholson@lomalinda-ca.gov with the subject line "City of Loma Linda Document Management Software RFP". Physical copies can be sent to ATTENTION: Barbara Nicholson 25541 Barton Rd. Loma Linda, CA 92354.

Submittals that are not received on or before the specified deadline will not be accepted (no exceptions). The City reserves the right to request follow-up information or clarification from vendors in consideration. Vendor is responsible to ensure delivery by the date and time included.

The City of Loma Linda reserves the right to reject any or all submittals, to compare the relative merits of the respective responses, and to choose a vendor, which will best serve the interests of the City.

Each response to this RFP shall be done at the sole cost and expense of each proposing vendor and with the express understanding that no claims against the City for reimbursement will be accepted.

1.3 Evaluation Criteria

Responses to this RFP will help the City identify the most qualified vendor and will be indicative of the level of the firm's commitment. The City will evaluate the qualifications, references, overall fit with the City of Loma Linda, as well as take into consideration the proposed scope and pricing submitted to determine the most qualified web vendor.

1.4 Selection Process

The selection process will involve the following phases:

Phase 1 (December 2, 2021):

Proposals are due.

Phase 2 (December 6 –9, 2021):

A City review team will evaluate vendor submissions. The initial review will determine conformance to submission requirements and whether responses meet the needs of the city.

Phase 3 (December 14, 2021):

The City will enter into negotiations leading to a professional services agreement and submit to City Council.

2.0 Project Description

2.1 Project Objectives

The City intends to improve records management, retention, indexing, work flow, document access and retrieval of documents created and utilized by city staff and citizens. The City is seeking to install a Document Management System (DMS) and is currently looking for potential vendors, which can provide a system that is designed for government use and includes necessary business functions and all associated interfaces.

The city is looking to meet the following objectives:

- a. Establish a main repository for documents
- b. Reduce manual processes and increase productivity
- c. Increase integration and interaction between departments
- d. Improve workflow processes to streamline movement of documents between staff and departments to improve customer service

- e. Full text searching of documents stored in the DMS using Optical Character Recognition (OCR) technology
- f. All users will interact directly with the DMS to either enter/track their existing paper or retrieve documents as needed from other departments
- g. Reduce liabilities through effective management of multiple types of documents (scanned or electronically generated), and improving the tracking, retrieval, retention, and final disposition of these documents

Examples of documents that would be considered to upload into this system include, but are not limited to:

Agreements	Meeting minutes
Audit reports	Grant documentation
Budget documents	Entitlements
Board Actions	Project plans
Building Permits	Presentations
Contracts	Purchase Orders

Documents handled by a typical department include, but are not limited to: 8 ½" x 11", 8 ½" x 14", or 11 x 17" in size, and can include both printed and handwritten text. These document can be both single/double-sided; they can be folded, stapled, wrinkled, faded, and odd-size documents (e.g., post-it notes). Document types include, but are not limited to: TIF, PDF, JPG, Microsoft Office standard formats such as .docx and .xls.

Consultant is responsible to comply with all statutory rules and regulations. All applicable federal, state and local laws, rules and regulations governing this type of service will apply and will be deemed incorporated into this project. These requirements shall be done at consultant's expense, at no expense to the City.

The City of Loma Linda reserves the right to accept or reject any and all proposals, or any part of any proposal, without penalty. The City of Loma Linda may award a contract to a single contractor for all elements for the entire project or may award any of the elements separately. In addition, the City of Loma Linda reserves the right to fund (and proceed with project or purchase), not to fund the project, or to partially fund the project. Any allowance for oversight, omission, error, or mistake by the bidder made after receipt of the proposal will be at the sole discretion of the City of Loma Linda.

If a bidder discovers any ambiguity, conflict, discrepancy, omission or other error in this RFP, please immediately notify the City of such error by e-mail at:

Barbara Nicholson, City Clerk

City of Loma Linda

E-Mail: bnicholson@lomalinda-ca.gov