

# Request for Proposals

Oak Lodge Water Services

Electronic Records Management System

February 2023

Oak Lodge Water Services (OLWS) is requesting proposals for a cloud-based electronic records management system (ERMS) meeting DOD 5015.2 certification requirements. Proposals will be accepted electronically until 10 a.m. PST on Wednesday, March 8, 2023. Proposals received after the deadline will not be considered.

OLWS reserves the right to reject any and all proposals, to waive irregularities and informalities in the request for proposal and evaluation processes, and to accept any proposal deemed to be in the best interest of OLWS. No vendor may withdraw their proposal for a period of 90 days after the proposal due date.

Please contact the OLWS Representative by email for additional information.

OLWS Representative:

Laural Casey, CMC  
District Recorder  
[laural@olwsd.org](mailto:laural@olwsd.org)

Dated this day, Tuesday, February 7, 2023.

## **Additional Information**

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### **Background**

Oak Lodge Water Services (OLWS) is a joint water and sanitary authority providing drinking water, wastewater, and watershed protection services in unincorporated Clackamas County, Oregon and portions of the Cities of Milwaukie and Gladstone. OLWS serves over 29,000 customers 24/7/365 with under 40 staff members.

OLWS is currently practicing paper-based records management. Vendors will need to exhibit proficiency in assisting small government organizations in the implementation of an electronic records management system.

### **Timeline**

The anticipated timeline for selection and implementation is outlined below. OLWS reserves the right to modify this timeline.

March 8, 2023	Deadline for Proposals
March/April 2023	Contract Negotiations and Notification of Intent to Award
March 29, 2023	Notification of Contract Award (Pending Budget Approval and Adoption)
May 2023	OLWS Budget Adoption
July 1, 2023	Beginning of Fiscal Year and Kick-off of ERMS Implementation
December 31, 2023	Proposed End of Testing and Implementation Period
January 1, 2024	Deadline for ERMS "Go-Live"; Continued Technical Support and Software Maintenance for Remainder of Contract and Renewals.

### **Proposal Requirements**

Proposals must include the following elements, without which a proposal may be deemed insufficient.

1. Cover Letter signed by the vendor representative authorized to bind the proposing vendor contractually.
2. Table of Contents

3. Executive Summary providing a high-level summary of your proposal.
4. Proposal
  - a. Include enough documentation and/or descriptions that OLWS can ascertain if the software meets organization needs as listed below.
  - b. Total costs for the services and software modules as described. Line-item costs outlined by services, users, or other single units of measurement are preferred.
  - c. Include costs for required and optional training.
  - d. Include all annual maintenance, software support, and data conversion costs; as well as any other fees expected in the first three years of service.
  - e. Outline a step-by-step design of the implementation process.

5. Company Information

Please complete the following list for all companies involved in the proposal.

- a. Name of company and role on project.
- b. Name of parent company.
- c. Length of time in business.
- d. National, regional, and local office information.
- e. Identify the number of personnel at each location that would provide support for the proposed software.

6. Client References

Vendors must provide at least two client references.

- a. Reference Name
- b. Contact Name
- c. Title
- d. Phone Number
- e. Organizational Type (city, special district, etc.)
- f. Size of Organization
- g. Size of Customer Base
- h. Software Version
- i. Installation Dates

7. Terms and Conditions

- a. Any objection to any term or condition contained in the proposed contract that is published with this RFP must be noted in the proposal, along with the reason for the objection and the vendor's preferred alternative term and condition proposed.

Submission of a proposal will signify the vendor's agreement that the proposal is valid for 90 days following the submission deadline and will become part of the contract that is negotiated between OLWS and the successful vendor.

## **Software Requirements**

- DOD 5015.2-STD certification.
- Cloud-based platform.

## **Vendor Requirements**

- Experience working with Oregon municipalities.
- Experience with the Oregon County and Special Districts retention schedule, and the ability to build out the retention schedule for OLWS is preferred.
- Ability to provide onsite and remote training for all software modules and system administration.

## **Additional Preferred Functionality**

- Optical Character Recognition (OCR) capability, including handwriting OCR, and OCR search functionality.
- Auto-saving version control on working documents saved within the ERMS.
- Audit tracking and record recovery capabilities.
- Record auto-capture technology, especially with, but not limited to, the Microsoft Office Suite.
- Existing or near-future integrations with the following software systems: Springbrook, Accela, and Lucity.

## **Proposal Selection and Evaluation**

Proposals will be evaluated by a Review Committee. Vendor ranking will be determined using the following criteria: overall aesthetic, ease of records input, searchability of archive, security and regulatory compliance, integrations with other OLWS software, and cost.

During the evaluation process, OLWS has the right to require any clarification of submitted materials. Vendors must respond within two business days. Otherwise, the vendor may be deemed non-responsive.

## **Warranty**

Vendors must not limit or exclude any implied warranties. Terms and conditions of all warranties offered must be defined. Vendors must warrant that the goods furnished will conform to the specifications for at least a three-year period.

## **Incurring Costs**

Neither OLWS, nor its agents, are liable for any cost incurred by vendors prior to issuance of an agreement, contract, or notice to proceed.

## **Vendor Responsibility**

The selected vendor will be required to assume responsibility for all services offered in the proposal whether or not the vendor or a sub-contractor/affiliate produces them. OLWS will consider the selected vendor responsible for all contractual matters.

## **Award of Contract**

Award of contract will be made to the vendor whose proposal provides the most favorable records management solution. OLWS reserves the right to reject all proposals and not issue a contract based on this RFP. If negotiations with the top-ranked proposer are unsuccessful, OLWS will move to the next ranked proposer.

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