



Request for Proposals
Electronic Records Management System
Questions and Answers

- Q.** At full implementation, how many users/licenses will OLWS need? Will these be full user licenses, or will some be inquiry only?
- A.** A price differentiation between the different user types would be helpful for the Review Committee. To keep it simple, a cost estimate of 40 full users would suffice. If you would also like to supply a second cost estimate of 5 full users and 35 inquiry only, that would be helpful. Then the Committee can see the scalability of price.
- Q.** What information are you requesting in the References section under “size of organization” and “size of customer base”.
- A.** The requested information is to gauge how similar the organizations are to us. Preferably you would give us comparable references, those with under 50 employees serving small communities of 25-30,000 people. However, we understand that no two organizations are alike, even if we are sized the same.
- If you could tell us roughly how many employees and licenses the organizations have, that would suffice for “size of organization”. For “size of customer base” we are looking at the population served. We have customers, but cities have citizens. Either works.
- Q.** Do you have any CJIS (Criminal Justice Information System) information that will be stored in the ERMS?
- A.** No.
- Q.** Who does OLWS contract with for IT services and how much are you paying annually for this service?
- A.** OLWS contracts with Convergence Networks for IT services. The cost is about \$75,000 for the base contract. Each year there are various special projects budgeted for, but they are contracted separately.
- Q.** What type of documents do you have? Both classification and file type.
- A.** OLWS’ record types vary widely due to the various departments within our organization. Everything from finance and general administration, to legal and HR, as well as engineering and

field operations maps, plans, and work orders. OLWS retains records according to the Oregon Special Districts Retention Schedule. We have almost all the record types outlined in this schedule: <https://secure.sos.state.or.us/oard/displayDivisionRules.action?selectedDivision=589>

The file types most commonly retained as official records are .pdf, although we do have .m4a, .jpeg. Working documents are mostly Word, Excel, or other Microsoft product file types.

Q. Is OLWS willing to execute an NDA for our company to provide the requested customer contact information?

A. OLWS understands this question to pertain to the RFP Proposal Requirement No. 6, which requests contact information for two or more client references. Please note that references from other public agency clients (with public contact information) are preferred.

OLWS is a public entity that is subject to Oregon public records laws. For customer information, or any other information that is included as part of a proposal and which a proposer wishes to keep confidential and believes to be exempt from disclosure under Oregon public records laws, OLWS declines to enter into a separate non-disclosure agreement, but will treat such information as confidential using the following procedure:

Proposers must mark the specific information that they believe is exempt from disclosure, and which they would like to be kept confidential, as "CONFIDENTIAL" when submitting a proposal. Proposals may not be marked "CONFIDENTIAL" in full; proposers should identify only those specific portions of the proposal that they wish to remain confidential as "CONFIDENTIAL." By identifying information as "CONFIDENTIAL," the proposer affirms that:

1. The information is being submitted to OLWS in confidence;
2. The information is not otherwise required by law to be submitted;
3. The information is reasonably considered to be confidential; and
4. The public interest would suffer by disclosure of the information.

If so designated, OLWS agrees that it will, in good faith, keep the identifying information confidential and exempt the record from public disclosure. In the event that, pursuant to Oregon public records laws, OLWS is requested to disclose any information that has been identified as CONFIDENTIAL, OLWS shall, to the extent allowed by law, decline to release the confidential information, and shall provide the proposer with prompt written notice of the request, so that the proposer may seek to protect the information from disclosure. In the event that the proposer is unsuccessful in protecting all or part of the confidential information in OLWS's possession from disclosure, or if OLWS is legally compelled by a court of competent jurisdiction to disclose the confidential information, OLWS shall only disclose such portions of the confidential information that OLWS is legally required to disclose.

Q. Is the not-to exceed amount of \$150,000 the total contract value for the 3-year 'Initial Term'?

A. Yes.

Q. Is the not-to-exceed amount inclusive of both software and implementation services costs?

A. Yes.

- Q.** Is the scenario that a vendor’s proposed 3-year total software and services costs exceed this amount – is that automatically disqualifying for consideration?
- A.** No. A higher cost proposal will not be disqualified from consideration; however, price and value for the proposed system services is one of the evaluation factors that will be considered in reviewing each proposal received. Any contract resulting from this RFP will be contingent on the Board of Directors adopting a budget and appropriating the amount needed for the services.
- Q.** Is the execution of the provided proposed contract a requirement for procurement?
- A.** Yes. If there are any provisions in the proposed contract that a proposer does not wish to agree to, the proposer must state what the specific provisions of dispute are, as part of its proposal. Be specific; wholesale rejections of the proposed contract will not be considered. For each provision in dispute, the proposer should explain the reason it does not agree to the provision, and should provide an alternative contract provision that OLWS may consider. Note that many contract provisions are required by law to be included in all public contracts. If the provision is not required by law or internal policy, OLWS may consider reasonable alternatives that may be suggested by a proposer.
- Q.** If the vendor’s preference is to contract through a vendor-provided Customer Master Agreement and separate Professional Services proposal for implementation, is OLWS willing to negotiate and execute these contracts?
- A.** No. OLWS has published a copy of the proposed contract along with the RFP. The proposed contract includes legally required terms and has been drafted as the proposed agreement for the services requested. Wholesale rejections of the contract will not be considered. OLWS may consider additional or alternative provisions as presented by a proposer, if a reasonable basis for the change is included as part of the suggested revisions.
- Q.** How do I submit a bid for this RFP? Is there a portal, or do we submit by email?
- A.** Please submit proposals to the OLWS Representative via email at laural@olwsd.org.