Pre proposal Meeting/ RFP Document Scanning Question

Meeting dated: 11/15/13

RSD Attendees: William Sloan – Director of Purchasing, Tim Rooney - CFO, and Kelvin McMillin – Assist. Superintendent for HR, Bonnie Torgerson – Purchasing Assist.

1. Proposal due November 29, 2013 and that is the day after Thanksgiving. Is that a good date?

Per Bill Sloan the date will be changed to Monday, December 2, 2013 at 3:00 pm. RFP Document has been amended on the Rockwood RFP site.

2. In regards to classification/indexing, how will the files be subdivided?

The current view Per Kelvin McMillin is files for active employees will be indexed as follows: General, Medical Records, Evaluations, and Transcripts/certifications. Retiree records will be indexed by General and Medical.

Also if the Employee ID# is not currently on the files will the vendor be allowed to utilize SSN as an index field?

Per Tim Rooney if we can't use SSN, the BPlus or CIMS (retirees) HR ID will be used. The district will provide a cross reference with the HR ID's, Names and SSN if necessary.

3. Will any of these 2.5 million pages going to be duplexed?

Per Bill Sloan, the 2.5 million pages for the existing HR files is an estimate only and it is possible some of the pages in the files could be duplexed. Also the salary history may be posted on the inside of the file jacket.

4. How many employees, current and prior are you counting?

Per Tim Rooney, we have 3,100 current employees and the HR files go way back to when the District started in 1908.   Vendors that would like to see the HR file room and Annex basement storage can call Bill Sloan to schedule an appointment.

5. Any issues with the color of the papers? No, per Bill Sloan. Some of the older documents may be faded or discolored and we realize this may require an adjustment to the file sizes for improved quality of the scanned document.

6. What are your preferences to using a local Company?

Per Tim Rooney, the concern may be primarily logistical in terms of accessing and or transporting records. Preferences may vary by individual but pricing will be just as important.   Our policies state local companies are given preference when proposals are equivalent.

7. Can we place our hardware on site?

Answer was yes by Tim Rooney if it makes economic sense and adequate space can be made available.

8. How many users (see pg. 6 and pg. 18), will be using the system? Answer: We anticipate 16 users based upon scanned documents for HR and Finance records.

9. Referring to pg. 9 question #2 what does this mean? The types of software listed were intended to be examples not a requirement. Tim replied, tell us about your company's expertise and how good you are and how proficient your staff is with the proposed software.

10. Does district want to scan items themselves, what is preferred? Put this information into proposal per Tim Rooney and Bill Sloan, "we are not the experts." We have copiers with scanning capability that can be scanned to a file or folder. The RFP includes a request for a high volume scanner that can be used by Rockwood staff to a network file/folder or application.

11. Page 13, #2 what does this mean? Please explain the process used to index and organize documents into the library structures. Are there limitations with the software solution related to the type of file structure a client may use?

12. Page 18 question #3, 5a. What is meant by ongoing support? Tim Rooney replies, training for Rockwood staff if needed.

13. Question, Page 18, #5. What does total cost based on volume mean? Bill Sloan; need pricing matrix completed and must include all fees totaled for full scanning service, annual fees, set up and maintenance fees, for upfront and ongoing costs.

14. What is the expected turnaround time? Per Kelvin McMillin for the initial HR record/ full scanning project should be completed by the end of the fiscal school year, June 30. Deadlines may be negotiated beyond June 30th if condition of the files require more prep time than expected.

15. Any preferences for copiers or scanners? High-volume scanner is our preference. District copiers do have scanning capability.

16. Will you be willing to release a good amount of records at a time? Per Tim Rooney, yes, however there are concerns about security breach. Proposals must include tracking of all documents removed from site. The District will consider Companies scanning documents on site.

17. New deadline set when question asked about price matrix looks like all on one scanner.

Tim Rooney stated the intent is to purchase a scanner for use at the Annex building where the student records are kept. The scanner will be used initially to scan financial documents – check records. The full scanning service project will include retiree records first then active HR records over the summer time. The initial scanning project may continue through the summer but should not go beyond 9/1/14 (see item 14).

18. Shredding after the fact issues; do you want it back? Bill Sloan stated, you can include the shredding in the proposal. Tim stated, perhaps we may use a sub-contractor to do the shredding after records have been verified by Rockwood staff. Vendors can include shredding as part of their proposal.

19. What is the location and what type of access do we have to the files and who will box documents?

The Central Office files are in the lower level of the Administration building with a half flight of stairs. The files stored at the Annex have approximately 30 concrete stairs to the basement area where boxed files are stored on shelves. Bank boxes are the size used to store and transport records.

20. In regards to the onsite solution space how large of an area will be required for equipment and scanning staff?

A space roughly half the size of the conference room should be sufficient. Estimated at 14' x 16'.

21. The District uses Microfilm for storage of student files which is the preferred format per the Department of Elementary and Secondary Education in the State of Missouri.

The files may eventually be converted to the electronic format.

22. Page 13 Database architecture supports Oracle, is this just an example? Yes, Rockwood currently uses SQL server.

23. Page 7, last bullet point, Project objectives, please explain. The District routinely scans PDF files into HR/Finance system. Can we import scanned documents into the proposed storage solution?

24. Page 14, 4th down, Test environment, please clarify. Explain if additional licenses are required for databases other than production? Test database, disaster recovery, etc.

****Questions below from Scanning America / Brett Benson****

25. DocStar and FileBound are mentioned as being applications that are in current use at the School District. Is the intention to keep both of those applications in use or is the intent to convert the images and data form those two systems into the system chosen at the end of this bid process?

These were used as examples of applications that your staff may or may not use. Rockwood does not use these applications but would like to understand the applications your staff support and utilize as part of the proposed solution.

26. I'd like to confirm that the District is asking for 20 user licenses. We estimate 16 to 20 users as the system gets fully implemented and business/finance documents are added to storage.

27. Is concurrent user licensing mandatory? No, please provide limitations related to licensing.

28. Is it required that the responding vendor's staff must be experienced in DocStar and FileBound?

No requirement. Please explain or provide the level of expertise of your staff for similar appliations or formats.

29. Would the District consider a response for only the document scanning portion of the RFP? If the responding vendor can assure 100% compatibility with the chosen content management system as well as the two legacy systems, would the District consider separating the document scanning portion of the RFP?

The District will choose the proposal(s) most favorable to the District and may split the award or make multiple awards.

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