

WAUKESHA COUNTY, WISCONSIN



CONSULTING SERVICES RELATED TO ELECTRONIC CONTENT MANAGEMENT

REQUEST FOR PROPOSAL #0945

Dated: 10/13/09

KEY PROPOSAL DATES	
Questions Due:	12:00 Noon on October 22, 2009
Contact Name	Diane Knoll, CPPB, Sr. Buyer
Contact E-mail	dknoll@waukeshacounty.gov
Contact Fax	262-548-7668
Pre-Proposal Conference	10:00 a.m., October 23, 2009
Submission of Proposals	2:00 p.m. on November 12, 2009

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WAUKESHA COUNTY
PURCHASING DIVISION
ADMINISTRATION CENTER, ROOM 310
515 W. MORELAND BLVD.
WAUKESHA, WI 53188

REQUEST FOR PROPOSAL – 0945 Consulting Services Related to Electronic Content Management

Submission Requirements:

This RFP is issued on behalf of Waukesha County by the Purchasing Division, which is the sole point of contact during the procurement process.

***Sealed proposals for furnishing services as specified below are to be mailed to the Office of the Waukesha County Purchasing Division, Administration Center - Room 310, 515 W. Moreland Blvd. Waukesha, WI 53188 no later than 2:00 p.m. on November 12, 2009. NOTE: If you are delivering your response in person, you must enter through the main Courthouse public entrance (Door #2), 515 W. Moreland Blvd and deliver it to the Department of Administration receptionist in Room 310 of the Administration Center to be time-stamped no later than 2:00 p.m. on the opening date. Be sure to allow sufficient time to obtain entry as the County has now instituted a Controlled Access policy. For more information – go to www.waukeshacounty.gov and click on the Waukesha County Security Screening link located at the bottom of the page.**

***Waukesha County will also accept electronic responses. Vendors wishing to do so should reference the Proposal Submission Section.**

ALL PROPOSALS RECEIVED AFTER THE DATE AND TIME SPECIFIED WILL BE REJECTED

PROPOSAL SUBMISSION:

One (1) original and seven (7) copies of the vendor response document, and one original and one copy of the pricing document are to be submitted in **SEPARATE SEALED ENVELOPES** to the Waukesha County Purchasing Division no later than 2:00 p.m. November 12, 2009.

The two separate proposal envelopes must be identified in the lower left corner as follows:

Vendor Response Document for 0945 Consulting Services Related to Electronic Content Management

OPENING DATE: November 12, 2009

Pricing Document for 0945 Consulting Services Related to Electronic Content Management

OPENING DATE: November 12, 2009

Any Proposal received in an envelope not properly and clearly marked as specified above may result in the proposal being rejected. It is the vendor's responsibility to comply with the above in order to assure its inclusion at the proposal opening.

FAX OR EMAIL RESPONSES WILL NOT BE ACCEPTED - ALL FAXED OR EMAIL RESPONSES RECEIVED WILL BE REJECTED.

Proposals will be opened and the name of the respondents read at the time indicated. Details of each proposal, including proposed fees, shall not be announced at the time of opening. Such information shall be made public after an award has been made all negotiations are completed.

All proposals received in response to this request will become the property of the County and will not be returned to the respondents.

NOTE: THIS PAGE IS TO BE COMPLETED ONLY IF YOUR FIRM IS NOT RESPONDING TO THIS RFP

RFP #0945

In order to assist the Purchasing Division of Waukesha County in evaluating and improving our solicitation process, we are asking that you complete this form and return it to Diane Knoll via fax (262.548.7668) or e-mail, dknoll@waukeshacounty.gov. If we do not receive this form by the opening date of the Bid/RFP, we will assume that you can no longer supply this commodity/service and your name will be removed from our vendor list for this item.

_____ 1. The terms and conditions of the Request for Bid/Proposal document were restrictive. Our objections are:

_____ 2. We did not feel we could be competitive.

_____ 3. We could not submit a Bid/Proposal because of the marketing or franchising policies of the manufacturing company.

_____ 4. We do not furnish the items/services requested in the Request for Bid/Proposal.

_____ 5. Insufficient time to respond.

_____ 6. We could not meet your required delivery/time schedule.

_____ 7. We did not have sufficient staffing at the time.

_____ 8. We did not receive subject Invitation to Bid/Request for Proposal.

_____ 9. Please remove our name from this category in the vendor list.

_____ 10. Other: _____

PRINTED NAME DATE

SIGNATURE PHONE

COMPANY NAME FAX

Purchasing Division
Administration Center, Room 310
515 W. Moreland Blvd.
Waukesha, Wisconsin 53188-2473
<https://purchasing.waukeshacounty.gov>
Phone: (262) 548-7888
Fax: (262) 548-7668

PROPOSAL SUBMISSION REQUIREMENTS

- A. CLARIFICATIONS** - If additional information is needed to interpret the specifications/requirements, **WRITTEN QUESTIONS MUST BE RECEIVED NO LATER THAN THE TIME/DATE AND ADDRESSED TO THE PERSON NOTED ON THE COVER PAGE.**

No information provided verbally, or by any other personnel, will be considered binding. All respondents should use this written document and its attachments as the sole basis for proposal at this time.

Additionally, the County prohibits communication initiated by the respondent to any County official, representative from another entity or employee evaluating or considering the proposals, prior to the time a decision has been made.

- B. CONTENTS OF PROPOSAL** - All attachments, additional pages, addenda or explanations supplied by the vendor with this proposal will be considered as part of the proposal response.

If an oral presentation/interview is required of selected finalists, it shall be at the respondent's expense. However, an award may be made without discussion with the respondents. Therefore, respondents are cautioned that proposals should be submitted initially on the most favorable terms, from both a technical and cost standpoint. Unnecessarily elaborate brochures or other presentations beyond that required to present a complete and effective proposal are not desired.

- C. NONCONFORMING TERMS & CONDITIONS** - A response that includes contractual terms and conditions that do not conform to the contractual terms and conditions in the RFP document is subject to rejection as nonresponsive. Waukesha County reserves the right to permit the respondent to withdraw nonconforming terms and conditions from its response or negotiate changes to the contractual requirements prior to making a determination of responsiveness.

- D. ALTERNATE PROPOSALS** - An alternate proposal is viewed by the County as a proposal describing an approach to accomplishing the requirements, which differs from the approach set forth in the solicitation. An alternate proposal may also be a second proposal submitted by the same respondent, which differs in some degree from its prime proposal.

The County may consider or reject any or all alternate proposals submitted.

- E. RESERVATIONS** - This RFP does not commit the County to award a contract, to pay any costs incurred in the preparation of a response to this request or to procure or contract for services or supplies. The Purchasing Division reserves the right to accept or reject any or all proposals received as a result of this request, to waive minor irregularities in the procedure, to negotiate with any qualified source, or to cancel in part or in its entirety, this RFP, if it is in the best interest of Waukesha County to do so.

- F. NON-INTEREST OF COUNTY EMPLOYEES AND OFFICIALS** - No official or employee on the evaluation committee shall have any financial interest, either direct or indirect, in the proposal or contract. No official or employee of the evaluation committee shall exercise any undue influence in the awarding of the proposal or contract.

- G. AMENDMENT OF PROPOSALS** -

By County: Requests for Proposals may be amended by the Purchasing Division in response to need for further clarification, specifications and/or requirements changes, new opening date, etc. Amendments will be posted to the Waukesha County purchasing website, at <https://purchasing.waukeshacounty.gov>. **It is the responsibility of prospective vendors to check this website for any future amendments, questions, revisions, etc., prior to the opening date. All amendments must be acknowledged on the signature page in the area provided. Failure to do so may result in your response being rejected.**

If you are unable to access the Internet, contact the buyer listed within the RFP to request paper copies.

By Vendor: Proposals may only be amended after receipt by the Purchasing Division by submitting a later dated proposal that specifically states that it is amending an earlier proposal. No proposal may be amended after the opening date unless requested by the Purchasing Division.

- H. WITHDRAWAL OF PROPOSALS** - Proposals may be withdrawn only in total and only by a written request to the Purchasing Division prior to the time and date scheduled for opening of proposals.
- I. OTHER CONSIDERATIONS** - Factors which include, but are not limited to, quantity involved, time of completion, purpose for which required, competency and financial capacity of vendor, ability to render satisfactory service and past performance will be considered in determining status as a responsible vendor. The County reserves the right to request additional information as may reasonably be required to make this determination and to further investigate the qualifications of the respondent as deemed appropriate.
- J. RFP TABULATIONS** - RFP Tabulations are available to the public after contract award, approximately 60-90 days from the date of opening. RFP Tabulations can be found at <https://purchasing.waukeshacounty.gov>. If you are unable to access the Internet, you may contact 262-548-7888 for a hard copy. Copies are 15 cents per page plus postage costs if applicable.

CONTRACTUAL REQUIREMENTS

The successful contractor will be required to execute Waukesha County's Service contract, as well as the County's B-2-B Agreement, both of which are posted at our website along with this solicitation.

Waukesha County
Request for Proposal # 0945
Consulting Services Related to Electronic
Content Management
October 13, 2009

I. INTRODUCTION

Waukesha County is seeking professional consulting services assistance to prepare for a long-term strategy for Enterprise Content Management (ECM) and Electronic Document Management (EDM), Storage and Archival solution.

Current records management related products purchased and in use at the County include Stellent, Ektron, Versatile, InfiniVault and Microsoft Office SharePoint Server (MOSS). As the County seeks to move to a more complete integrated automated ECM solution that encompasses and efficiently addresses all records at the County (including electronic, email and related workflows) we require the expertise of a contractor to evaluate/determine if our current suite of products (as is state) is optimum for the County in its desire to move forward with ECM.

II. BACKGROUND

Waukesha County stores documents in a variety of ways and formats. Most departments store their electronic documents on a local drive assigned to their department/division. There are other departments that scan their paper documents using a Kodak i660 located in the Records Management Division or a copier/scanner device located in their department/division. The documents are scanned into indexing software, Ecapture by Captovation/Oracle. The batches of images are then indexed in Ecapture and then committed into Stellent (image retrieval software/backend image repository). There are also bar-coded documents (ex. Land Records) that are scanned into Ecapture and ran through Recognition Server that reads the barcode and auto indexes the images, which are then stored in the Stellent system.

III. SCOPE

The successful consulting firm (herein after Contractor) will provide:

Analysis, review and evaluation of the current records management and retention systems:

Contractor will:

- Meet with Waukesha representatives in a series of analysis and design meetings, and work independently to:
 - Identify team members and their role(s) through interviews
 - Evaluate/Assess the County's "As Is" environment as it relates to:
 - o Existing records management tools available at the County (including but not limited to Stellent (imaged), MOSS, Ektron (web), ProStore Systems InfiniVault data preservation/storage system and Versatile (paper).
 - o Review existing documentation including:
 - The Enterprise Content Management Feasibility study completed by Imerge in 2006.
 - The Baseline IT Inventory Report as completed by Plante Moran in 2006.Both which can be reviewed by clicking on the following link:
http://www.waukeshacounty.gov/uploadedFiles/Content_Department/Administration/Purchasing/Reports.zip

- Record retention schedules which relate primarily to paper documents as developed and maintained by the County which can be viewed by clicking on the following link:
http://www.waukeshacounty.gov/uploadedFiles/Content_Department/Administration/Purchasing/Retention.zip

The established record retention schedules have been approved by the State of Wisconsin Public Records Board and the State Historical Society of Wisconsin for all departments. These schedules were developed based on paper records and may require updates to incorporate electronic documents/records.

As an output and follow-up to this analysis the contractor will provide a recommended information architecture detailing the future state suite of products.

Recommend an e-Document Management and Archival solution

Contractor will:

- Provide a functional “roadmap” to an ECM solution that identifies how to acquire and build the future state suite of products including the nuances of the system(s), appropriate taxonomies, business rules and workflows to address all record retention and management functions over the course of the lifecycle of all electronic, email, web and paper related content. The roadmap will also specify existing product suites the County should discontinue using and new product suites the County should acquire and a plan for implementing. Include an Information Architecture of the resulting system.
- Develop a taxonomy, utilizing the records management workflow and functionality desired. Prepare a file plan document detailing all of the contents of the system to include directories, sub-directories and naming conventions for departments/individuals/end users containing:
 - o Identified Metadata Management
 - o Version control
 - o Content types
 - o Item-level Security
 - o Information Rights Management
- Identify proposed workflows and their associated roles (“groups” of persons whom will have various workflow actions).
- Identify disposition rules (how long each record type should be retained and the removal process for those record types).
- Provide recommendations and a solution for how e-document management strategies can be best integrated with the County’s current and ongoing records management process and record retention schedules.
- Document the Information Architecture, including creating a series of look-and-feel mock-ups of the system screens, present the Information Architecture Assessment report to the project manager and eDocument team; and receive sign-off.
- Create a detailed Project Portfolio document. This document of work will refer to the File Plan, and contain a high-level executive summary and background section, as well as spelling out the development process, development deliverables, assumptions & constraints, and development timeframes.

- Develop a functioning Proof of Concept Pilot eDocument Management application developed using the MOSS application (pilot division has been designated as the Human Resources Division within the Department of Administration) unless the contractor determines a more efficient solution can be used. The proof of concept will focus on all staff in the Human Resources area and all electronic and paper documents including email. In the event the contractor determines/recommends that MOSS be utilized by the County as part of its future state ECM solution the contractor will build a working proof of concept that includes a functioning taxonomy utilizing that application. If the contractor determines MOSS should not be part of the solution, Contractor will provide a detailed explanation as to why not and include an alternate recommendation. If the recommendation includes products that the County does not own, the proof of concept will not be implemented, however, the remaining tasks must be completed. The results of the efforts to date will be used in a subsequent procurement document. Note: Recommendations may not include products and services that are considered proprietary.
- Identify any “gaps” in the application of the MOSS solution (or recommended alternate if available to the County), to develop the Proof of Concept, and recommend “best of breed” alternatives to bridge those gaps.
- Present a final Project Portfolio document, design examples, Information Architecture, and functioning Proof of Concept application. Make any required edits, and receive sign-off.
- Prepare a return on investment (ROI) analysis for the solution proposed.
- Provide training and knowledge transfer to Waukesha County identified business and technical staff relative to the recommendation and MOSS application.

IV. DELIVERABLES

1. The Contractor will provide a report that includes the information delineated below. A draft copy (one hard and one electronic copy) will be submitted to the Project Manager no later than one-hundred twenty (120) calendar days after contract execution.

The County will review and respond as to approval or modification required within five (5) working days. The Contractor shall correct all defects or deficiencies considered by the contractor and the County to be within the scope and resubmit to the County within five (5) work days.

The report will include:

- An evaluation/assessment of the County’s “as is” environment. A recommendation/roadmap, including an ROI, for the County’s future state as it relates to a complete ECM solution which would include workflows and encompass all County records including electronic, email and web content. Inclusive of this is a detailed e-record filing scheme classification plan (including taxonomy and master business classification scheme development that will be used for indexing electronic content).
- An Information Architecture detailing all levels of the Records Management System.
- Look-and-feel mock-ups (screen prints) incorporating the Information Architecture.
- A completed Project Portfolio document for the design, construction and deployment of the Records Management System, as well as estimated delivery timelines.

- A Proof of Concept developed using MOSS or another solution available to the County without further procurement. If the alternate solution is not available, Contractor must still provide a functioning taxonomy for the alternate solution.
- Training and knowledge transfer to Waukesha County identified business and technical staff.

V. OTHER

1. The Contractor will assign a person to the project team that is a Certified Records Manager.
2. Controlled access screening is mandatory for all vendors seeking access to the Courthouse and Administration Center.

Vendors who will be visiting either the Courthouse or Administration Center (515 W. Moreland Blvd.) are to enter and exit the facilities through the main Courthouse public entrance (Door #2), 515 W. Moreland Blvd. Screening will take place in the lobby of the Courthouse. A corridor near the Courthouse lobby connects both buildings together.

The County's internet website www.waukeshacounty.gov has been updated to include a quick link for Security Screening. More detailed information regarding the screening process can be viewed on this site. A map of the Government Center campus identifying public access points and parking areas is included in this link.

3. All subcontractors must be identified in your proposal response. If subcontractors are used, Waukesha County will consider the proposing vendor to be the Prime Contractor and to be solely responsible in all contractual matters, including payment of any and all charges resulting from such subcontractor arrangements.

The Prime Contractor will be fully responsible for the acts, errors, and omissions of the Sub-Contractor. The Contractor shall cause appropriate provisions of its proposal to be inserted in all subcontracts ensuing to ensure fulfillment of all contractual provisions by subcontractors.

4. The Contractor will be required to sign Waukesha County's B-2-B (Business to Business) Network Access Agreement. A copy of this agreement is posted with this solicitation.
5. Background Checks: Contractor shall complete background checks at Contractor's expense on all personnel prior to starting any activity for the County. Contractor shall confirm in writing to Waukesha County that they have successfully conducted the background checks prior to the commencement of work and that Contractor will not use any personnel for whom background checks have revealed factors that make them unsuitable for the activity to be undertaken for the County. This includes replacement personnel.

At a minimum, resources to be checked should include, but are not limited to, civil (<http://wcca.wicourts.gov/index.xsl>) and criminal records (<http://wi-recordcheck.org/index.html>), Department of Transportation motor vehicle/licensing records (<http://www.dmv.org/wi-wisconsin/departments-motor-vehicles.php>). In order to do so, Contractor must obtain certain information for each of the Contractor's employees expected to be performing work for Waukesha County. At a minimum, the information shall include full name (including middle initial), date of birth and social security information. Additional information that is helpful in completing background checks includes maiden name, sex, race, driver's license number and issuing state and places of residence for the last three years. NOTE: If the individual has resided outside of the State of Wisconsin within the last three (3) years, you will have to do similar research within the state they resided in.

All costs associated with the background checks are to be borne by the Contractor. All records received as a result of background checks are to be retained by the Contractor for a period of three (3) years after contract expiration.

Waukesha County reserves the right to request the results of the background checks and/or to do additional background checks on their own.

6. Compliance with Federal Immigration Laws and Regulations: Waukesha County supports the Immigration and Nationality Act (INA) which includes provisions addressing employment eligibility, employment verification and non-discrimination. The filing of a proposal in response to this RFP is considered certification that the proposer is in compliance with the INA and has established appropriate procedures and controls so that no services under this contract will be performed by a worker who is not legally eligible to perform such services.
7. The County shall be entitled to request the removal of individuals working on any project for any of the following grounds, provided that such request be in writing and shall specify the reasons for the County's dissatisfaction: (i) unsatisfactory performance that causes negative operational impact at the County or causes the County to commit additional resources to avoid operational impact; (ii) dishonesty or belligerent conduct; (iii) lack of compatibility with County staff; or (iv) violation of County rules or policies. Upon such written request, the County and Contractor shall decide on a course of action to cure any such problems, provided that there shall be no cure opportunity required for problems involving categories (ii) or (iv) in the preceding sentence.

In the event Contractor does not cure the problem within (7) days from the date of notice, Contractor shall remove such person and shall promptly provide a qualified replacement. The County will be liable for payment of services only up to the time of removal and provided then only if services rendered meet the minimum requirements of the County. If the removal occurs within a two (2) week period after commencement, there will be no cost incurred by the County.

The Contractor is responsible for ensuring that any substitute personnel have comparable skills and experience. Resumes must be submitted for approval by Waukesha County for substitute personnel. The County reserves the right to interview substitute personnel prior to commencement of activity on the project.

8. The successful Contractor(s) shall establish and maintain procedures and controls for the purpose of assuring that no information in its records or obtained from Waukesha County or from others in carrying out its functions under the contract shall be used or disclosed by it. Waukesha County reserves the right to review such procedures to ensure acceptability to Waukesha County. If information and/or records are requested of the successful Contractor(s) by anyone other than Waukesha County personnel, Waukesha County shall be notified immediately. Waukesha County will address all requests.
9. All personnel working on-site shall be required to wear an ID badge, dress appropriately and maintain proper hygiene. Failure to do so can be cause for termination of the individual.
9. The County will not be held responsible for payment of travel to and from the Waukesha County job site, nor will reimburse the contractor and/or firm for any expenses related to providing staff that reside outside of the Waukesha County area.
10. During this project, the Contractor shall be required to submit status reports on a bi-weekly basis identifying the current status, estimated time of completion, and cause of delay, if any, and a list of critical actions required of the County.

11. All deliverables and/or other products of the contract, including but not limited to all procedures, reports, records, summaries, and other matter and materials prepared or developed by the Contractor in performance of the contract, shall be the sole, absolute and exclusive property of Waukesha County, free from any claim or retention of rights, thereto on the part of the Contractor, its agents, subcontractor, officers, or employees.
12. The contractor will be provided a work area for the purposes of conducting interviews/focus groups, etc. The County's normal business hours are 8:00 a.m. - 4:30 p.m. Monday - Friday. Access to the building beyond these hours may be restricted.

VI. INSURANCE

The successful contractor shall agree that it will, at all times during the term of the agreement, keep in force and effect insurance policies required by the contract as noted below. Insurance certificates must be issued by a company or companies authorized to do business in the State of Wisconsin and that are satisfactory to the County. Such insurance shall be primary. Prior to execution of the written contract, the successful contractor shall furnish the County with a Certificate of Insurance issued and upon request, certified copies of the required insurance policies. The Certificate shall reference the contract and provide for thirty (30) days advance notice of cancellation or non-renewal during the term of the agreement.

Failure to submit or maintain the insurance requirements can make the contract void at the County's discretion. Minimum requirements are as follows:

Worker's Compensation and Employer' Liability Insurance – Statutory worker's compensation benefits and employers' liability insurance with a limit of liability not less than \$100,000 each accident. Contractor shall require subcontractors not protected under its insurance to take out and maintain such insurance.

Commercial General Liability Insurance (including errors and omissions) – Policy shall provide coverage for premises and operations, products and completed operations, personal injury and blanket contractual coverage. Errors and omissions shall not be excluded or a separate policy covering such exposure shall be maintained. Limits of liability are not less than \$1,000,000 per occurrence and aggregate.

Waukesha County, its boards, commissions, agencies, officers, employees and representatives must be named as additional insured with respects to the General Liability and so stated on the certificate of insurance.

Automobile Liability Insurance – Business automobile policy covering all owned, hired and non-owned private passenger autos and commercial vehicles. Limit of liability not less than \$500,000 combined single limit.

VII. CONTRACT TERM, PRICING AND PAYMENT

Term: The contract term will begin upon contract execution. The contractor is to provide the County, in their best professional judgment, the timeframe for this project, including anticipated starting dates, critical milestone projections, and the completion dates.

Pricing: The cost proposal should include a "not to exceed" fee for the project, **inclusive** of items which are normally referred to as **reimbursable expenses**, i.e., travel, meals, lodging and overtime work requiring higher than regular rate for which no additional compensation will be due and **excluding** the cost of developing a Proof of Concept. **The cost of developing a Proof of Concept using the**

MOSS application is to be listed separately in the pricing document only. This will be the cost to be used in determining point scores for cost evaluation purposes.

Contractors should provide the hourly rate in the Cost Proposal should additional services be required that are not listed in the Scope of Service. These amounts should not be included in the Vendor Response Document.

Payment: Payment for services provided will be tied to specific milestones and/or deliverables. Invoices will be paid within 30 days of receipt of a properly documented invoice and acceptance of the milestones/and or deliverables identified in the Statement of Work according to the following schedules if completion is satisfactory:

- 10% upon contract execution
- 25% upon approval of deliverables and content
- 40% upon submission of final draft documentation for approval
- 25% upon completion and acceptance of the deliverables

Waukesha County's preference is to pay for goods/services on a P-Card. Indicate in the pricing document whether you will accept MasterCard for payment purchases. Vendor should note how many days after receipt of invoice payment must be processed to accept the credit. Please keep in mind that we will not process payment until/unless goods or services have been received (or accepted if applicable).

If you are unable to accept credit card, payment will be made within thirty days after acceptance of equipment and receipt of a properly documented invoice. Note: Invoice must be sent to the location specified on the purchase order to avoid delays in payment. Vendors who wish to quote a discount for early payment against a purchase order may do so (reference the payment terms of the Pricing Document). For example, 1%/10 days. Discounts will be taken into consideration when evaluating costs.

VIII. CLARIFICATIONS/PRE-PROPOSAL CONFERENCE

Any questions concerning this RFP must be submitted in writing by **12:00 p.m. on Thursday, October 22, 2009** to:

**Waukesha County Department of Administration
Purchasing Division
Attn: Diane Knoll
Administration Center, Room 310
515 West Moreland Blvd.
Waukesha, WI 53188**

Questions may also be submitted **in writing** by fax to 262-548-7668 or via email to dknoll@waukeshacounty.gov. Questions submitted either by fax or email must be marked **"QUESTIONS FOR #0945 Consulting Services Related to Electronic Content Management.**

Vendors are expected to raise any questions, exceptions, or additions they have concerning the RFP document prior to the submission of the proposal.

If a vendor discovers any significant ambiguity, error, conflict, discrepancy, omission, or other deficiency exists in the RFP, the vendor should immediately notify the above of such error and request modification or clarification of the RFP document. In the event that it becomes necessary to provide additional clarifying data or information, that revises any part of this RFP,

supplements or revisions will be provided to all recipients of this initial RFP via written amendment.

Vendors are also invited to attend a pre-proposal conference to be held at **10:00 a.m. on Friday, October 23, 2009** in Room 355/359 of the Administration Center (Please review Section V, Item 2 for details on Waukesha County's controlled access policy).

IX. PROPOSAL FORMAT & SUBMISSION

A. Format

In order for the committee to adequately compare proposals and evaluate them uniformly and objectively, firms must complete **ONLY** the County's Vendor Response and Pricing documents **regardless of whether you are submitting hard copy or electronically**; i.e. do not submit the Vendor Response document and a response in another form/format. The Vendor Response document is posted on Waukesha County's website along with this RFP and identified as ***0945 Consulting Services Related to Electronic Content Management*** - Vendor Response Document.

Failure to use the Vendor Response Document may result in your response being rejected. If both our Vendor Response document and another submittal format are received, only the Vendor Response document will be evaluated.

Although additional documents/attachments may be submitted with either your hard copy or electronic response, they should not be excessively long or submitted in an elaborate format. Additional or attached documents are not to be used in place of responding to the questions in the vendor response document; i.e. do not respond with "Reference Attachment". Unnecessary attachments beyond those sufficient to present a complete, comprehensive and effective response should not be included. Proposals will not be evaluated on the aesthetics of the package.

The Vendor Response Document may be submitted hard copy or electronically – **DO NOT SUBMIT BOTH AN ELECTRONIC AND A HARD COPY OR BOTH MAY BE SUBJECT TO REJECTION.** See below for detailed instructions for both methods.

B. Vendor Response Submission - Hard Copy:

Respondent shall be required to mail* one (1) original, **UNBOUND**, clearly marked and identified as such, and seven (7) copies of the Vendor Response Document no later than 2:00 P.M. CST on November 12, 2009 to:

**Waukesha County Purchasing Division
Administration Center, Room 310
515 W. Moreland Boulevard
Waukesha, WI 53188**

Each **HARD COPY** should be bound, with the exception of the original. The copies should be bound by staple, binder clip or in a three-ring binder. Spiral, wire or comb bound copies are not acceptable.

***NOTE: If you are delivering your response in person, you must enter through the main Courthouse public entrance (Door #2), 515 W. Moreland Blvd and deliver it to the Department of Administration receptionist in Room 310 of the Administration Center to be time-stamped no later than 2:00 p.m. on the opening date.**

Be sure to allow sufficient time to obtain entry as the County has now instituted a Controlled Access policy. For more information – go to www.waukeshacounty.gov and click on the [Waukesha County Security Screening](#) link located at the bottom of the page.

Responses should be identified in the lower left corner as follows:

VENDOR RESPONSE, RFP #0945 Consulting Services Related to Electronic Content Management - OPENING DATE: November 12, 2009

Envelopes, which are not properly identified or received after the above date and time, will be rejected.

C. Pricing Document Submission - Hard Copy:

The Signature Document should be printed, completed in its entirety with the exception of the tracking ID field (this field is only required for electronic submissions), and signed. **Note: Be sure to acknowledge any amendments issued, if applicable, in the box located above the signature area.** The signature document along with one (1) original clearly marked and identified as such, and one (1) copy of the Pricing Document should be mailed* no later than 2:00 P.M. CST on **November 12, 2009** to:

Waukesha County Purchasing Division
Administration Center, Room 310
515 W. Moreland Boulevard
Waukesha, WI 53188

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Proposal should be identified in the lower left corner as follows:

Pricing Document, RFP #0945 Consulting Services Related to Electronic Content Management - OPENING DATE: November 12, 2009

Envelopes, which are not properly identified or received after the above date and time, will be rejected.

D. Response Submission - Electronic Submission:

Respondents may use the Purchasing website for submission by creating an electronic response following the directions contained therein (<https://purchasing.waukeshacounty.gov>). **Fax or email responses are not considered electronic submissions.**

The following documents will need to be downloaded and saved to your computer to provide an electronic response:

- ✓ Vendor Response Document
- ✓ Pricing Document

Once you have made your response final, you must print out the signature document and fax it the Purchasing Division (262-548-7668) prior to the opening date and time. This document will now have a tracking ID associated with it. **Note: Be sure to acknowledge any amendments issued, if applicable, in the box located above the signature area.**

X. EVALUATION OF PROPOSALS

Proposals will be evaluated in accordance with the criteria listed below. Award will be made to the responsive, responsible firm who complies with the requirements and score the highest total on the evaluation criteria as it pertains to the overall needs of Waukesha County.

Firm Experience and qualifications in providing consulting services of a similar nature and firm's experience with a County or other units of government.	15%
Experience of Personnel assigned to this project; specifically with Electronic Content Management systems analysis, education of individuals and completeness of resumes.	35%
Proposal responsiveness including a clear understanding of the project scope, approach to informational gathering, detailed work plan and timeline for completion.	25%
Cost	25%

XI. PROPOSAL DATES

The following dates are provided for your information and planning purposes. Although every effort will be made to follow this schedule, we reserve the right to modify the dates as necessary.

RFP Release Date:	Monday, October 19, 2009
Questions Due:	12:00 Noon., Thursday, October 22, 2009
Pre-proposal Conference:	Friday, October 23, 2009 @ 10:00 a.m.
Amendment Posted:	No later than COB October 26
Proposals Due:	2:00 p.m., Thursday, November 12, 2009
Evaluation of Proposals:	Completed by day, November 19, 2009
**Interviews/Demos:	Tuesday, November 24, 2009
Notice of Award:	COB Wednesday, November 25, 2009
Finance Committee Approval:	December 9, 2009 (Pending Finance Schedule)
Contract Execution:	Approximately December 14, 2009

**The County anticipates sending written notification by Friday, November 19, 2009 to the proposers selected for the interview process. Proposers not selected will be notified that their proposal will no longer be considered unless the Committee finds, after the completion of interviews, that additional proposers should be interviewed.

END OF DOCUMENT