

EL DORADO LAFCO

LOCAL AGENCY FORMATION COMMISSION

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REQUEST FOR PROPOSALS FOR **ELECTRONIC DOCUMENT MANAGEMENT SYSTEM: DESIGN AND** **IMPLEMENTATION**

I. INTRODUCTION

General Information

The El Dorado Agency Formation Commission (LAFCO) is seeking proposals from qualified firms to design and implement an electronic document management and retrieval system, hereinafter referred to as the "project." The scope of the project includes the (a) purchase, (b) set-up, and (c) training for all associated software and equipment necessary to support the project.

There is no expressed or implied obligation for LAFCO to reimburse responding firms for any expenses incurred in preparing proposals in response to this request.

To be considered, a proposal must be received by José C. Henríquez, Executive Officer, El Dorado Local Agency Formation Commission, 550 Main Street, Suite E, Placerville, CA 95667, on or before August 13, 2010 (5:00 p.m.). LAFCO reserves the right to reject any or all proposals submitted.

During the evaluation process, LAFCO reserved the right, where it may serve its best interest, to request additional information or clarifications from responders, or to allow corrections of errors or omissions. At the discretion of LAFCO, firms submitting proposals may be requested to make oral presentations as part of the evaluation process; however, selection may be limited to the content and quality of their written proposal.

LAFCO reserves the right to retain all proposals submitted and to use any ideas in a proposal regardless of whether that proposal is selected. Submission of a proposal is acceptance by the firm of the conditions contained in this request for proposals, unless clearly and specifically noted in the proposal submitted and confirmed in the contract between LAFCO and the firm selected.

It is anticipated the selection of a firm will be completed by the end of August, 2010.

Following the notification of the selected firm, it is expected a contract will be executed between all parties no later than September, 2010. It is anticipated that the project should be completed no later than June 2011.

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José C. Henríquez, Executive Officer • Erica Sanchez, Policy Analyst

Denise Tebaldi, Interim Commission Clerk • Andrew Morris, Commission Counsel

Creation of LAFCOs

Following the end of World War II, California entered a new era of demographic growth and diversity and economic development. With this growth came the need for housing, jobs and public services. To provide for these services, California experienced a wave of newly formed cities and special districts, but with little forethought as to how the new agencies should plan for services. The lack of coordination and adequate planning for future governance led to a multitude of overlapping, inefficient jurisdictional and service boundaries.

In 1963, the State Legislature created Local Agency Formation Commissions (LAFCOs) to help direct and coordinate California's growth in a logical, efficient, and orderly manner. Each county within California is required to have a LAFCO. LAFCOs are charged with the responsibility of making difficult decisions on proposals for new cities and special districts, spheres of influence, consolidations, and annexations. El Dorado LAFCO is a separate agency from the County of El Dorado, the Cities of Placerville and South Lake Tahoe and from any special district within El Dorado County.

As part of regulatory and planning responsibilities, LAFCO annually generates and receives a considerable amount of documentation. This includes certificates and resolutions confirming governmental boundary changes, which must be retained in perpetuity for legal purposes. Additional documents, such as studies and staff reports, must also be retained for historical records. It has been the practice of LAFCO to retain documents in their original paper form in onsite and offsite storage facilities. This practice, however, has proven inefficient and ineffective given a number of documents have been accidentally misplaced, lost, or destroyed.

Composition of El Dorado LAFCO

El Dorado LAFCO is a seven-member commission, consisting of the following: Two members from the El Dorado County Board of Supervisors, two members from city councils, two members from special district boards of directors and one member from the public at large. Each category has an alternate Commissioner who serves in the absence of the regular member. Staff to El Dorado LAFCO includes an Executive Officer, two full-time administrative employees, one part-time administrative employee and legal counsel. El Dorado LAFCO also utilizes consultant assistance on a limited basis to supplement staff efforts.

Current LAFCO Digital Archiving Efforts

LAFCO staff has begun scanning certain documents and storing them on a shared drive in Adobe Portable Document Format (pdf). While it is preferable that the proposed document management system incorporates and utilizes the work already performed, it is not a precondition for consideration nor should it dissuade a qualified firm from responding to this RFP. The successful firm should demonstrate how and why its proposed design meets the objectives and technical requirements as specified below, even if the proposed document storage format is not pdf.

II. PROPOSAL OBJECTIVE AND TECHNICAL REQUIREMENTS

The underlying objective of the project is to allow LAFCO to efficiently scan and import documents into a central repository. The electronic document management system should include the ability to store, index, search, retrieve, and distribute documents. It is important that the electronic management system has the ability for keyword searches for purposes of research and document retrieval. The electronic document management system should also be user-friendly while providing an appropriate level of security to protect against unauthorized use or access. Additionally, the electronic document management system should have the ability to transmit and archive data on compact discs, flash drives or zip files and be compatible with LAFCO's autoarchive software.

Nearly all documents imported by LAFCO are drawn from Microsoft Office applications, such as Word, Excel, and Outlook. The remaining imported documents are generally generated from ArcGIS and can be converted into a JPEG or TIFF.

Any electronic document management system must be compatible on PC-based client/server platform. The user interface must be programmed using Microsoft Windows standards and compatible with the following operating systems and technology:

- Windows 2008 ServerSP2, Standard Edition with Media
- Windows 7 or Windows XP (Service Pack 3), and IE 6, on client PCs
- Mozilla Firefox 3.6 or later
- MS Outlook for e-mail service
- McAfee Anti-virus software
- MozyPro Backup software.
- Product must be certified or in process for certification for MS Office

III. PROPOSAL REQUIREMENTS

The following material is requested to be received by the proposal due date or the firm will not be considered:

- 1. Cover Letter** - The cover letter should briefly state the firm's understanding of the objective to be performed, the commitment to address the specified objective and statements as to why the firm believes it is best qualified to meet the needs of the objective. The cover letter should indicate whether the firm is independent with respect to LAFCO, that the firm is an Equal Opportunity Employer and state its federal identification number and designated contact person.
- 2. Firm Description and Statement of Qualifications** - The firm should set forth the following:
 - A. Proposed Scope of Service** – The firm should specify how it plans to address the objective listed in this RFP.

- B. Qualifications and Related Experience of the Firm's Personnel** – Either the resume(s) or an attachment should include all relevant experience, education, licenses and continuing education of the individuals over the past 3 years.
- C. Related Work Experience and References** – Provide at least three (3) client references. The reference list must include the client name, location, and contact person with telephone number.
- 3. Maximum Fee and Hourly Rates** - Identify a proposed not-to-exceed cost to complete the project. The proposed cost of the project should itemize each major task, equipment or product and include appropriate training for LAFCO staff. All hourly rates and fees should be clearly stated. Please identify additional post-project costs as appropriate, including annual licensing fees and technical support services.
- 4. Proposed Schedule** – Identify an overall project schedule, including the timing of major work tasks.
- 5. Other Information Required in Proposal** - The firm shall make a positive statement that it has the required insurance policies in force in acceptable amounts of coverage for Professional Liability, Workers Compensation, Comprehensive General Liability and Auto (Owned and Non-Owned). Prior to any commencement of services, the firm will be required to provide certificates of insurance coverage to LAFCO.

Please provide one unbounded and three bounded copies of the proposal.

IV. EVALUATION CRITERIA

LAFCO staff will review all written proposals received. Staff will rank each firm based on the content and quality of their written proposal. Specific evaluation factors include:

- (a) Project approach;
- (b) Relevant work experience;
- (c) Reference checks;
- (d) Schedule;
- (e) Proof of insurance to perform the work;
- (f) Proof that the firm has secured the appropriate licenses and rights of use for any software and hardware required to fulfill this project; and
- (g) Cost.

Based on its review, staff will identify the written proposal that best meets the needs of LAFCO and will negotiate a final scope of services along with price and schedule with the selected firm. It is anticipated a professional services agreement with the selected firm will be executed in September 2010.

Please note LAFCO reserves the right to adjust this timeline as it deems necessary. Notification of any timeline adjustments will be sent to all firms on the RFP circulation list and posted on the LAFCO website.

A negotiated contract will be awarded to the consultant that best meets the proposed needs at a reasonable price. Although cost is a factor, LAFCO is under no obligation to award this project to the proposal that represents the lowest cost.

V. OTHER INFORMATION

Consultants may submit questions seeking clarification or additional information regarding this RFP. Questions may be submitted by e-mail and directed to José C. Henríquez, Executive Officer, at jhenriquez@edlafco.us. All questions must be received no later than 5:00 pm on Monday, July 12, 2010. Response(s) to the submitted question(s) will be sent to all firms on the RFP circulation list electronically and posted on the LAFCO website no later than 5:00 pm on Thursday, July 22, 2010.

The application deadline is Friday, August 13, 2010 at 5:00 pm.