

**Town of Bristol  
Request for Proposals  
Assessment and Warehousing Services for Documents**

**Proposals are due no later than 12:00pm on September 15, 2017  
and shall be sealed and addressed to:  
Nicholas J. Coates, Town Administrator  
Town of Bristol  
230 Lake Street  
Bristol, NH 03222**

The Town of Bristol seeks proposals for consulting services to assess the Town's document storage needs and implementing a two-year plan to scan and store the documents.

The Town seeks a multi-year contract beginning April 1, 2018. Contract goals include: 1) an independent, comprehensive assessment of the Town's current document storage policies and practices; 2) tactical recommendations for improvements; 3) a strategic plan that addresses all major aspects of document storage; and 4) scanning and warehousing services.

Five (5) sets of the sealed proposals are due no later than 12:00 Noon on Friday, September 15, 2017. Questions regarding the proposal should be directed to Town Administrator Nik Coates, [townadmin@townofbristolnh.org](mailto:townadmin@townofbristolnh.org) or 603-744-3354.

The Town is aware of the time and effort required to prepare responses to proposals and invites vendors to let us know of any proposal requirements that are unclear and/or create difficulty in responding. The Town reserves the right to reject any and/or all proposals and to waive any informalities or irregularities in procedure.

**A. BACKGROUND**

Like most public bodies, the Town has accumulated paper documents because of legal requirements and the absence of a broader plan on how to manage and store them. At the same time, the Town is in the process of planning its building needs for the next 25 years, including the possibility of a new or upgraded Town Office and Police Department. The Town seeks consulting services from a firm with access to a broader array of service options, knowledge base and skills, strong communication and reporting capabilities, and the ability to respond quickly and with appropriate resources in emergency situations.

This project will encompass the following departments that work out of the Town Office: Assessing, Executive/Administration, Finance, Health, Human Resources, Land Use/Health, Town Clerk/Tax Collector and Welfare. Each department is governed by retention policies outlined in federal and state law and well as municipal policy.

Our assessment of the project is as follows:

<b>Department</b>	<b>Quantity</b>	<b>Documents</b>
Assessing	3 +/-	Four drawer cabinets of tax files
Assessing	7	Four drawer fire proof cabinets of assessing records
Executive/Administration	10 +/-	Meeting minute binders
Executive/Administration	3 +/-	Project files and contracts
Finance	4	Two drawer cabinets of financial documents
Finance	2	Four drawer cabinets of accounts payable/receivable documents
Finance	15 +/-	Payroll and accounts payable manifest records
Fire	TBA	TBA small-sized project
Human Resources	5	Four drawer cabinets of employee personnel files
Land Use/Health	8	Four drawer cabinets of project files
Land Use/Health & Water/Sewer	1,000 +/-	E Size drawings
Land Use/Health	25 +/-	Planning/Zoning reports/plans
Land Use/Health	10 +/-	Meeting minute binders
Library	1 +/-	Two cabinet drawers of financial, personnel and building files
Library	3 +/-	Binders of financial files
Town Clerk/Tax Collector	TBA	TBA
Water/Sewer	TBA	TBA small-sized project
Welfare	2	Four drawer cabinets of case files
Other	20 +/-	Boxes of files in long-term storage filled with documents from these departments

## **B. SCOPE OF SERVICES**

The Town seeks a qualified firm to provide document scanning and warehousing services, including:

1. Meet jointly and individually with key personnel;
2. Assess existing document quantities and locations;
3. Assess existing document storage policies and procedures;
4. Assess existing back-up and disaster recovery procedures;
5. Provide practical and cost-effective short- and long-term recommendations to address any identified deficiencies in practices;
6. Research, recommend, and install new equipment;
7. Develop two-year plan to scan, store and access documents and plan for disposal;
8. Create and maintain up-to-date inventory, map and barcode all storage cabinets and facilities;
9. Provide appropriate regular reports of findings and recommendations, with particular focus on risk-management concerns; and
10. All other related and/or similar duties.

## **C. PROPOSAL FORMAT & SUBMISSION REQUIREMENTS**

Responding firms shall submit five copies of the proposal and proposals should include the following minimum components:

1. Firm name, address, and contact information of individuals authorized to answer questions.

2. Executive Summary: Briefly summarize the proposal and identify that which makes your firm uniquely qualified for this contract.
3. Firm Profile: Include background and ownership of the company; number of employees; location of primary and any satellite locations; number and nature of professional staff to be assigned to this project; identify supervisory and management staff and summarize experience.
4. Security: Describe background and security measures used in firm's hiring process.
5. References: Provide a list, with current contact information, of similar engagements performed by the proposer within the past three (3) years. Provide any additional data where your firm has previously worked for a governmental agency. Describe how your specialty area of expertise was applied to those clients and how it relates to this proposal.
6. Cost: Provide a standard fee schedule (hourly rate or other proposal) for services offered and include description of conditions, procedures, approvals, and rates for out-of-scope work and costs for any equipment or software. Describe consultant's ability to track costs by department for internal budgeting and billing purposes.
7. Subcontracting: Identification of any services that may be subcontracted, including if known the name of the subcontractor and applicable experience.
8. Insurance: Include proof of insurance, including worker's compensation and general liability of at least \$1,000,000 single limit. Within 15 days of selection and as a condition of the contract, consultant shall provide Certificate of Insurance naming Town of Bristol as additional insured. The Town shall be notified within 15 days in the event of loss or change in coverage or conditions or amounts of coverage. Each policy of insurance shall be issued by a financially secure insurer, duly licensed to do business in the State of New Hampshire.
9. Acknowledgements: Consultant shall acknowledge that it is an Independent Contractor and as such, shall receive no other compensation or considerations, such as those benefits, indemnifications and other considerations normally extended to employees of the Town and is responsible for providing any required or voluntary benefits to its employees. The Contractor shall not compensate, in any way, a Town official or employee or any member of the family of such officer or employee in the performance of any work under this contract.
10. Other: Vendors are welcome to submit supporting information or references in support of their proposal.

**D. EVALUATION AND SELECTION**

Evaluation of the responses will be based on the extent to which the response meets the requirements stated above and the Town's determination as to the extent to which the respondent is likely to be able to achieve the desired results and fulfill the purposes of the contract. Selection will be based on criteria including but not limited to:

<p><b>1. Experience/expertise</b></p>	<ul style="list-style-type: none"> <li>• Previous related experience and qualifications in the subject.</li> <li>• Clear knowledge of subject and operations.</li> <li>• Clear understanding of scope of work and other technical issues related to this engagement.</li> </ul>
<p><b>2. References</b></p>	<ul style="list-style-type: none"> <li>• History and performance of firm/project team on similar projects.</li> <li>• References and recommendations of previous clients.</li> </ul>

<b>3. Overall methodology</b>	<ul style="list-style-type: none"> <li>• Overall approach to the project.</li> <li>• Additional services, cost-saving measures, products, etc. will be considered for their usefulness or contribution to the engagement.</li> </ul>
<b>4. Resources</b>	<ul style="list-style-type: none"> <li>• Availability of essential personnel based on current workload and future commitments including how many hours each person will dedicate to the engagement.</li> <li>• Adequacy of amount and quality of resources.</li> </ul>
<b>5. Cost</b>	<ul style="list-style-type: none"> <li>• Cost including the overall project-task budget-distribution as well as itemized cost breakdowns.</li> </ul>
<b>6. Interview</b>	<ul style="list-style-type: none"> <li>• At the discretion of the Town, interviews may be arranged to assist in making a final selection.</li> </ul>

It is the Town’s intention to select one firm to perform all services. Selection is subject to Select Board approval.

The Town reserves the right to reject any and/or all proposals, to waive any technicalities, informalities or irregularities, to accept or reject all or part of a proposal, and to be the sole judge of the suitability of the proposals offered.

Questions regarding this request for proposals should be directed to Nik Coates, Town Administrator, at townadmin@townofbristolnh.org or (603) 744-3354.