City of Arnold
Request for Proposals
Unified Electronic Content Management System

The City of Arnold, Missouri will accept proposals for the purchase and implementation of a cloud-based scalable electronic content management system until 10:00AM CDT, on Tuesday, April 4, 2017. Proposals shall be forwarded to the City Clerk, City of Arnold, Missouri, 2101Jeffco Blvd, Arnold, MO 63010.

Proposals will remain the property of the City of Arnold, Missouri. Each proposal package shall contain the **original and two** (2) **copies** of the proposal. Proposals must be delivered sealed and marked, **"Content Mgmt"** in the lower left-hand corner of the package.

The City of Arnold hereby reserves the right to reject any or all proposals, to waive any informalities in the proposals received, and to accept the proposal or proposals that in its judgment will be in the best interest of the City of Arnold, Missouri. The City reserves the right to waive any variances from the original RFP in cases where the variances are considered to be in the best interest of the City. The City also has the option to accept any of the services of the proposal in part or in total.

Any person or firm may withdraw his proposal by written request at any time prior to the scheduled time for the opening of the proposals.

Proposals should be prepared simply and economically, providing a straightforward, concise description of the firm's capabilities to satisfy the requirements of this Request. The firm shall be responsible for costs incurred in the proposal preparation and delivery.

INTERPRETATION OF DOCUMENTS

If any person contemplating submitting a proposal is in doubt as to the true meaning of any part of this Request, or finds discrepancies in, or omissions, he may submit to the City a written request for an interpretation or correction thereof.

Requests for clarification or questions may be submitted in writing to Deion Christopher, IT Manager, City of Arnold, 2101 Jeffco Blvd, Arnold, MO 63010, by facsimile at (636) 282-2399 or by e-mail to dchristopher@arnoldmo.org.

Any interpretation or correction of the proposal request document will be made only by Addendum duly issued by the City and posted to the City's website. It is the responsibility of all contractors to review www.arnoldmo.org for any addenda prior to submitting their responses. The City will not be responsible for any other

explanation or interpretation of the Request. Each contractor acknowledges receipt of all addendum issued by signing the proposal form.

DESCRIPTION

Currently the City stores and shares electronic content to/from network drives, removable USB drives, stores content on the City's Microsoft hosted Office 365 Online Email and OneDrive accounts, or stores electronic content directly on their workstations for quick retrieval.

The City of Arnold is seeking a full featured solution that best matches the City's requirements. The solution needs to be pertinent to the needs of each department by being easy to use and intuitive to the staff. Therefore, the City will not entertain any incipient or mixed-vendor or mixed-systems solutions.

The City is in need of a unified system capable of addressing our following needs:

CLOUD-BASED:

The system must be fully cloud-based requiring absolutely no on premise storage.

The cloud-based solution must provide an uptime hosting access guarantee.

STORAGE:

The cloud-based storage must be siloed, and thus fully segregated from any other clients supported by the vendor.

The stored electronic content must be easily accessed and quickly retrievable.

The stored electronic content must be available for immediate extraction – in original format (unencrypted or otherwise not stored under any proprietary alteration) should the City decide to terminate usage of the proposed system at a later date; the electronic content must be sole property of the City of Arnold.

Storage must be truly redundant to ensure absolutely no loss of electronic content.

Storage must be secure from any current form of ransomware or other malicious attacks on the electronic content.

VERSIONING:

All changes to metadata, changing or renaming the content, changes to the substance or body of the content, and changes to file format (i.e., change a file from .docx into .pdf) must be tracked with the capability of rolling back while still keeping logs of those changes.

Along with physical changes to electronic content, versioning must list username and date and time of all changes.

Versioning should follow preset redaction policies.

RETENTION:

The solution must provide capabilities of invoking multiple retention policies based on individual content substance or body, templates, metadata, or explicit and implicit retention dates set by the system or users.

The solution must have functions in place to notify key personnel when electronic content retention dates are approaching, as well as when they arrive, and allow those key personnel the ability to dispose of, ignore, or change retention dates.

The solution should have the feature of assigning a default retention date/time to content lacking an explicit retention date/time to enforce personal electronic content review to keep storage requirements low and to eliminate broken or isolated content.

CAPTURE/SAVE:

Capturing/saving of electronic content must be intuitive and easy to use and provide high-level functionality catering to seasoned users while also providing a set of minimum requirements for less seasoned employees and employees with limited time for manual entries.

The solution should have multiple ways for users to capture, manipulate, and store electronic content.

Saving of electronic content should be capable of handling emails, email attachments, locally stored content, content created or manipulated on any Apple device, Android device, laptops, PC's, or tablet devices.

The capturing/saving components should include the capability of batch processing of electronic and scanned content.

The capturing/saving components should be able to handle a wide variety of Windows, MAC, and OpenSource file types and extensions.

The capturing/saving components should work with various web browsers.

CONTENT HANDLING:

The solution must provide an intuitive check-in and check-out process.

The solution must provide PCI compliance and vendor must provide a yearly PCI compliancy statement to the City or upon request, whichever is mutually preferred.

The solution should eliminate the need for compartmentalizing electronic content inside folders or other types of containers.

The solution should provide users multiple views of the electronic content (I.e. viewing content page-by-page, in tree view, by thumbnails, linked associations, etc.).

The solution should include preset permissions as well as allow explicit permissions to be set by key personnel.

The solution should provide multiple ways for users to transform the original electronic content (I.e. convert a .docx document into a .pdf file or transform a legible .pdf file into an editable .docx document).

SEARCHING AND RETRIEVAL:

The solution must make searches easy and intuitive.

Search results must follow established permissions for user access or restrictions.

Search results must provide easy access to, and viewing of, the electronic content returned, and provide appropriate redaction requirements based on permissions.

The search results should return results based on content name, date/time stamps and ranges, creator name, user names the electronic content result is shared with, any and all metadata fields, number of occurrences, and any others deemed required or appropriate.

The search results should provide users with tools to transform the original electronic content on the fly.

The search results should provide auditing of searches, search results, and what was done with the returned results (printed, emailed, shared, copied, etc.).

WORKFLOW:

The solution must provide various levels of workflow, from mundane two-step approvals, to full-featured, multiple steps incorporating multiple users.

Workflows should be easy to use and intuitive.

Workflows should be pre-set for specific electronic content templates, yet can be tweaked under special circumstances.

The solution should allow users the ability to create workflows, thoroughly test them, and ultimately put them into production.

Workflows should allow multiple user notification avenues.

Workflows should provide audit trails and allow users to track individual steps of a workflow from start to finish.

Workflow creation and tweaking should be accessible from multiple locations within the system.

TEMPLATES:

The solution must provide the ability to create templates based on individual or multiple electronic content, as well as the ability to assign pre-set workflows or allow users to create a new workflow and associate it to a template.

The solution should provide pre-made templates that are appropriate for local city government.

Templates should be automatically initiated by the solution during screen captures/scrapes or file saves.

PROPOSAL REQUIREMENTS

Proposals must be submitted in printed form sealed in an outer envelope with “Content Mgmt” clearly written in the lower left hand corner. Each should contain two additional envelopes separating the proposal content from the proposal

costs. Inside envelope #1 must be clearly marked **PROPOSAL** covering ONLY the proposal contents (original and two (2) copies) as detailed below. Inside envelope #2 must be clearly marked **PRICING** and contain a detailed listing of all project-related costs for the proposal being submitted. If your company is offering more than one solution, each must be submitted independently.

-Content of Proposal (Envelope #1):

A cover letter must be included, signed by an authorized representative of the company, outlining the intent of the response and stating that the information contained in the response accurately describes the solution, services and equipment to be provided. The proposal must also guarantee that all quoted prices will be honored for a specified period from the submission date.

Submittals must include:

1. General information about your company including:
    a. a summary list of services offered
    b. brief biographies of key employees
    c. a selective customer list – municipalities preferred
    d. a copy of the company's most recent SSAE16 report
    e. client references of clients (names and contact information) for which your company has completed a project similar in size and scope – completed cloud-based projects preferred.
2. Detailed listing of steps and/or processes leading to actual implementation of the proposed solution while mitigating downtime and keeping to a minimum any adverse effects to daily processes and user access (keeping redundant steps to an absolute minimum), and for installing/configuring/testing/training of staff on the completed cloud-based solution. Processes to be covered include:
    a. confirmed business requirements
    b. confirmed infrastructure requirements
    c. confirmed hardware and software requirements
    d. confirmed application requirements
    e. listing of tasks and estimated time required for each task
    f. proposed test plan
    g. proposed staff training schedule.
3. Timeframe showing a breakdown of steps involved from the project's start to the project's completion.
4. Detailed listing of new hardware, software, licenses, recurring costs, types of support offered, and any other services associated with the project.
5. A brief history listing past software/hardware/solution updates, version changes, upgrades, and number of hours or minutes of client downtime or lack of access to the system while these were being implemented.

-Cost of Proposal (Envelope #2)

A detailed cost sheet - with line-item breakdown - of the project's associated costs for hardware, storage, software, licenses, labor, training, after-project support, recurring monthly/yearly associated costs, and any other tangible or intangible costs associated with this project.

PREFERED LISTING OF TASKS

The following is a suggested list of tasks requiring addressed for this project. If deviation(s) are required, documentation must be included in the RFP submittal detailing why such deviation(s) are needed for the solution(s), the cost savings or additional costs associated with the suggested deviation(s) and benefits gained by deviating from the originally suggested requirements listed below:

I. Needs Assessment
   i. Meet with staff to hear their departmental needs
   ii. Flesh out pre-configured workflows and templates
   iii. Discuss solutions based on department needs
II. Site Survey
   i. Review existing electronic content types and file sizes
   ii. Calculate storage needs
   iii. Access needs for hard copies needing digitized
   iv. Inventory workstations for adequate licensing
III. Network infrastructure review to ensure adequate throughput
   i. Cloud-based solution setup
   ii. Set up and configure the cloud-based solutionTest and ensure remote access and adequate throughput
IV. License procurement
   Purchase adequate licenses
V. Software/Hardware installation
   i. Install software
   ii. Procure, install and configure needed solution hardware
VI. Workflow & Template Creation
   i. Create pre-configured workflows based on needs assessment
   ii. Create templates based on needs assessment
VII. Establish Redaction Policies and Create Permissions
   Create policies, based on user permissions, for redaction and electronic content access
VIII. Systems Testing
   i. Conduct intensive tests for each department in a controlled test environment
   ii. Conduct stress tests and load balancing to ensure data flow
IX. Staff Training
   i. Provide training for key staff
   ii. Provide recursive training to remaining staff, as needed
X. Support

i. Provide on-site support, as needed, for up to one full week
ii. Provide off-site support, as needed, for up to three weeks
iii. Provide continual at-cost support, as needed, for up to two months after successful project completion

EVALUATION PROCESS AND CRITERIA

The City of Arnold will review all submittals received within the posted date/time specified, and will evaluate each proposal, references, and costs based on the following criteria:

A. Quality, availability and functional or other suitability of the solution proposed and services to the particular use intended.
B. Other factors, including, but not limited to, the following:
   (1) The ability, capacity and skill of the firm to perform the contract or provide the service required.
   (2) Whether the firm can perform the contract or provide the service promptly, or within the time specified, without delay or interference.
   (3) The character, integrity, reputation, judgment, experience and efficiency of the firm.
   (4) The quality of performance of previous contracts or services, if any.
   (5) The sufficiency of the financial resources and ability of the firm to perform the contract or provide the service.
   (6) The ability of the bidder to provide future maintenance and service for the use of the subject of the contract, and
   (7) The number and scope of conditions attached to the bid.
C. Whether the bidder is in default on the payment of taxes, licenses or other moneys due to the City. This factor alone shall justify disqualification.

The top submitters may be contacted for personal interviews to discuss the proposed solution. The final successful project proposal will be submitted to the City Council for approval.

WORK AUTHORIZATION AND DOCUMENTATION

Effective January 1, 2009, pursuant to 285.530 RSMo, for any bid/proposal in excess of $5,000, the company must affirm its enrollment and participation in a federal work authorization program with respect to the employees proposed to work in connection with the services requested herein by:

- Submitting a completed, notarized copy of Exhibit A, Affidavit of Work Authorization and returning with bid/proposal documents and
- Upon contract award, providing documentation affirming the company's enrollment and participation in a federal work authorization program (see below) with respect to the employees proposed to work in connection with the services requested herein.

E-Verify is an example of a federal work authorization program. Acceptable enrollment and participation documentation consists of the following two pages of the E-Verify Memorandum of Understanding (MOU): 1) a valid, completed copy of the first page identifying the bidder and 2) a valid copy of the signature page completed and signed by the bidder, the Social Security Administration, and the Department of Homeland Security – Verification Division.

INSURANCE AND LEGAL RESPONSIBILITY

A. INSURANCE: The Contractor shall obtain and maintain such insurance from an insurance company satisfactory to Owner and authorized to write casualty insurance in the State of Missouri as will protect himself, his subcontractors and the Owner from claims for bodily injury, death or property damage which may arise from any and all operations and under this Contract. Any such insurance policy shall name the Owner as an additional named insured. The Contractor shall not commence work under this contract until he has obtained all insurance required under this paragraph and shall have filed the certificate of insurance or the certified copy of the insurance policy with the Owner. Each insurance policy shall contain a clause providing that it shall not be cancelled by the insurance company without thirty (30) days written notice to the Owner of an intention to cancel. The amounts of such insurance shall be as indicated below:

(This certificate of insurance shall indicate the City of Arnold as additional insured and contain the appropriate signed endorsements as required by the City.)

(1) Workmen's Compensation and Employer's Liability Insurance:

Workmen's Compensation and Employer's Liability Insurance shall be secured and maintained as required by State where the work is located.

(2) Public Liability, Bodily Injury, and Property Damage:

a. Injury or death of one person	$1,000,000
b. Injury to more than one person in a single accident	$2,000,000
c. Property Damage	$1,000,000

(3) Automobile and Truck Public Liability, Bodily Injury, and Property Damage:

a. Injury or death of one person	$1,000,000
b. Injury to more than one person in a single accident	$2,000,000

c. Property Damage $1,000,000

(4) If the contractor maintains higher limits than the minimums required above, the City requires and shall be entitled to coverage for the higher limits maintained by the contractor.

(5) If the City determines appropriate a certificate of insurance must be filed with the City providing builders risk insurance for the proposed project.

B. INDEMNITY: The Contractor shall indemnify and save harmless City and its officers and agents and employees from and against all losses and all claims, demands, payments, suits, actions, recoveries and judgments of every nature or act of the Contractor, his agents or employees, in the execution of the work or in the guarding of it.

C. No provision of this agreement shall constitute a waiver of the City's right to assert a defense basis on sovereign immunity, official immunity of any other immunity available under law.

It shall be the Contractor's responsibility to procure and maintain any required permits and licenses, including a City of Arnold business license throughout the contract period.

Exhibit A
Affidavit of Work Authorization

Comes now _____(name) as _____(office held) first being duly sworn, on my oath, affirm _____(company name) is enrolled and will continue to participate in a federal work authorization program in respect to employees that will work in connection with the contracted services related to **Electronic Content Management System**, for the duration of the contract, if awarded in accordance with RSMo Chapter 285.530 (2). I also affirm that _____ (company name) does not and will not knowingly employ a person who is an unauthorized alien in connection with the contracted services related to **Electronic Content Management System** for the duration of the contract, if awarded.

In Affirmation thereof, the facts stated above are true and correct (The undersigned understands that false statements made in this filing are subject to the penalties provided under Section 575.040, RSMo).

_____	_____
Signature	Printed Name
_____	_____
Title	Date

Subscribed and sworn to before me the _____day of_____. I am commissioned as a notary public within the county of _____, State of _____, and my commission expires on _____.

_____	_____
Signature of notary	Date