

ADDENDUM 1
RFP#FY1809-07

DATED: October 24, 2017



FOR THE

Document Scanning and Imaging Project

ON BEHALF OF

THE OCONEE COUNTY BOARD OF COMMISSIONERS
OCONEE COUNTY, GEORGIA

THIS ADDENDUM FORM IS PART OF THE RFP DOCUMENTS ISSUED OCTOBER 12, 2017

The following questions were submitted to Oconee County in reference to RFQP#FY1809-07: Document Scanning and Imaging Project in an email correspondence from October 12, 2017 – October 23, 2017.

1. I do not see any geographic limitations on the RFP document, but I just want to confirm this is the case and we can bid on this project.
 - *No geographic limitations except that the documents cannot be taken out of the country, but distance from county facilities is taken into account when choosing a vendor for this project.*
2. Whether companies from Outside USA can apply for this? (like, from India or Canada)
 - *Companies from outside the USA can apply for this; however, the documents cannot be shipped outside of the United States. The company must have an office location inside of the United States where they can perform the scanning.*
3. Can we perform the tasks (related to RFP) outside USA? (like, from India or Canada)
 - *No, the documents are not allowed outside of the United States.*
4. Can any part of this contract leave the state of GA or the US for that matter? This would include subcontractors. Many companies have or partner with vendors outside the US.
 - *While parts of this contract can leave the state of Georgia, the documents can never leave the United States.*
5. Is there any specific format for the RFP response document we submit, other than what is listed on the "Overview" and Scope of Work" worksheets?
 - *The "overview" and "scope of work" provide the structure – the specific format is up to the vendor, and how it believes it can best present its proposal.*

6. Can you provide any additional information regarding the actual total volume/size of the project - i.e.; number of boxes, file cabinets/drawers, and/or pages? (This would be helpful to enable us to offer the most competitive rates.)
 - *The necessity to evaluate the remaining volume for the project is a part of the project.*
7. When you reference "Scan-on-Demand", are you referring to the ability to retrieve/have access to your files while the project is at our facility being scanned?
 - *Yes.*
8. Would you consider breaking out the scanning services separate from the document management component?
 - *We would like for the vendor to be able to help us provide both of these services as a part of this RFP.*
9. Whether we need to come over there for meetings?
 - *Yes, it is required to attend the meetings in person.*
10. Can we submit the proposals via email?
 - *No, a physical hard-copy is required.*
11. Would the city be willing to pack and ship the documents out of state to our facility?
 - *No. The vendor must come to the county location and extract the files themselves. If the vendor decides to do the scanning out of state, that is acceptable, however distance will be taken into account when deciding on a vendor.*
12. The RFP does not mention any indexing criteria for the scanned images. The vendor will need to index the images so that the Board can find the images on the Laserfiche (or equivalent) system. Do you have any indexing requirements as this is a key component for pricing?
 - *The indexing/taxonomy will have to be developed mutually between the vendor and the county. A taxonomy is not yet developed for any of the departments.*
13. If I am able to assess the taxonomy, should I include that as well in terms of pricing?
 - *There is not currently a taxonomy – the vendor and the county will have to work collaboratively on creating that.*
14. The RFP indicates that you have 95,000 pages for the County Clerk's office. It also states that volume counts for other departments will need to be evaluated. In order to get the best pricing for this project, an overall volume count would be very good to know so that the Board can get the benefit of 'economies of scale' for this project. Does your team have any estimates on the volume for the other departments?
 - *We do not have any good estimates at this time. Site visits to estimate file counts are welcomed.*
15. It appears that the Board is already using Laserfiche. Please confirm.
 - *The board is not yet using a digital document management system like Laserfiche, but we are planning on implementing one as part of this project.*
16. Does the County currently own Laserfiche? If so, are these departments currently using it and have the templates for the various applications?

- *We do not currently own laserfiche. Templates/Indexing/Taxonomy will have to be done collaboratively between the vendor and the county.*
17. Is this project funded? If so, what is that number?
- *Project will receive funding based on expected costs and estimates provided by vendors.*
18. Understanding that the County wishes to start with the Clerk Office and branch out to various other departments such as Human Resources, Finance and Coroner which may include sensitive material that are not subjected to the open record and therefore should include a higher degree of security on the vendor. Should the county include in this RFP that the preferred vendor have a SOC 3 certification or similar and also carry a 1M cyber insurance policy to protect the county in case of a breach? We are seeing this more commonly today in to deter the fly by nights and garage operations.
- *The RFP requires that the information remain “safe and secure” throughout the entire process. Things that you can demonstrate as proof of high levels of security (like a SOC 3 certification or a 1M cyber insurance policy) will definitely work in your favor.*
19. Based on my due diligence of the other departments, should I then include the pricing for ALL of the volume in my RFP response?
- *Yes – but also include the prices for the other items as per the cost section of the RFP.*
20. I do not think that we can make the 10/27 date. Is it possible to extend out a few more days?
- *Unfortunately it is not – The 10/27 date is final.*
21. Please provide the County Clerk’s Document Types for this project
- *Document types are currently unknown – taxonomy/indexing are a part of the project.*
22. Are the documents hand-written/typed?
- *There are documents in both categories.*
23. Are the documents single sided/double sided?
- *There are documents in both categories.*
24. Average size pages per file?
- *Unknown, but most common page size overall is 8.5” x 11”.*
25. What % of the documents have staples/paperclips/binder clips?
- *Currently unknown.*
26. The bound books, can these books be unbound for scanning?
- *For most bound books, yes – for documents that have historical value, no. The documents that have historical value will be identified as such during the process.*
27. Can the bound books that you reference in the RFP Overview be taken apart and/or can the spines be cut?
- *For most cases – yes. For some cases, where the books are historical in nature (and these documents will be chosen beforehand) – no.*
28. Will Oconee County Clerk’s provide a data file for the documents to be scanned
- *Vendor will need to work collaboratively with the departments (including the County Clerk) in order to best determine the most efficient method of scanning in documents.*
29. Where are these documents currently stored?

- *Documents are currently stored in Oconee County facilities, mostly within the Oconee County Courthouse, and the Oconee County Government Annex.*
30. Does Oconee County currently have an offsite storage vendor?
- *No.*
31. Will the County Clerk's office be available on the weekend to prep and pack the documents to the awarded vendor?
- *Scheduling for this project will need to be discussed after award, and must be centered on what scheduling works best for the County. As County Employees do not usually work weekends, and the main locations where documents are stored (Courthouse and Government Annex) are closed on weekends, this is unlikely.*
32. Can you provided the number of participants in this RFP?
- *The final number of participants will be known on October 27th, at 10:00 a.m. when we open the proposals.*
33. Will the awarded vendor automatically be given the additional departments for scanning and the County understands the scanning pricing will be different per department?
- *We are looking to establish a partnership with a vendor for the scanning of all necessary documents – however, being chosen for this project does not automatically guarantee the additional departments for scanning. If the pricing will be different per department, you must note that in your cost section.*
34. Do any color documents need to be scanned? If yes, what will be ratio?
- *Some color documents will need to be scanned, at a minimum of 300 dpi. It is unknown how many color documents we have.*
35. Any double sided documents need to be scanned? If yes, what will be ratio?
- *Some double sided documents will need to be scanned. The ratio is currently unknown.*
36. Can we pick up all the documents in one trip from county office? Can county specify exact no of documents to be scanned? This will help us determine packaging requirement and estimations.
- *Current document counts are unknown, evaluating the number of documents to be scanned is a part of the project.*
37. Does the county have a preference for how the vendor should deliver files apart from uploading them to Laserfiche? (CD, portable hard drive, secure FTP, etc.?)
- *Laserfiche (or equal) is the preferred method for how these documents should be delivered.*
38. Project timeline to be provided for 95,000 documents, however actual number of documents will be increased as other departments are added. Correct if otherwise.
- *We are starting with the County clerk's office, which has ~95,000 documents. However, once the other departments are evaluated and added to the project, we will be planning on having those documents scanned as well. The scheduling for any and all parts of the project will be mutually decided upon by the County and the Vendor, with the County's scheduling needs taking priority.*
39. Does county have any preference for date of completion for the project?
- *The county would like to have the project completed in as efficient and effective a manner as possible, while still preserving quality.*

40. How many pages are there per box? Are all boxes located at the same facility?
- *Files are not yet boxed, and files are spread out across multiple county facilities.*
41. What is the volume of pages to be scanned into the indexing system?
- *Current volume of pages is unknown, estimating the number of files to be scanned is a part of the project.*
42. How many users would access the indexing system on a day-to-day basis?
- *Currently unknown, but we would like to start with at least 5.*
43. How many users would be required for Laserfiche or equal access? Read only or Full access users?
- *To begin with, approximately 5 full-access users.*
44. What company sold you Laserfiche and LSAP support? If you're not using Laserfiche, how many Current Licenses (users) do you project on needing?
- *We do not have a current estimate for how many licenses we project on needing – to begin with, we will likely need at least 5.*
45. Is there any specific time frame for the conversion to completed?
- *The county would like to have the project completed in as efficient and effective a manner as possible, while still preserving quality.*
46. Is budget for this RFP already available?
- *Budget for the RFP will be based on the cost proposals to be sent in during the RFP process.*
47. What is the current infrastructure and technology in place at Oconee County?
- *Oconee County does not currently use a document management solution like Laserfiche or equal. The county has a computer network and a scanner system, however, as per the RFP, the vendor is required to use their own scanners offsite for the project.*
48. Primary requirement of ECM is data storage, search & retrieval or county is looking for other solutions such as automation workflows or Record Management?
- *Primary objective is records management/search & retrieval.*
49. Is this a new requirement? If not, can you please provide the name of the vendor, the current contract value and eligibility criteria to re-compete?
- *This is a new requirement.*
50. While our company is not a LaserFiche reseller, we offer an excellent document management solution that is extremely popular with municipal governments, and we can include this solution as part of our proposal. However, in the event the County elects to stay with LaserFiche, we can still perform the scanning services and seamlessly upload the images and metadata into LaserFiche, which we have done previously. Given this, would you consider breaking out the scanning services separate from the document management component?
- *The proposal allows for "LaserFiche or equal" – if your solution is equal in capabilities to LaserFiche, then including that in the proposal will be fine.*

51. Does the County have space for us to do the document prep on site? (Note: This may be a more efficient means of Document Preparation instead of boxing them up and taking them to our site in Forest Park, GA. Touch the paper once instead of twice)
- *We should have space available for the document prep at our locations – if that would be the most efficient and effective means of organizing the files, that can be made available.*
52. We understand that a taxonomy/index has not been created yet, but this is a crucial piece to this conversion in terms of both processing and pricing? How would you like the provider to name the scanned documents?
- *We would like the vendor to work with the County to help create a taxonomy for the documents for each department.*
53. Does the County plan on indexing the documents after they are uploaded to the Laserfiche (or equivalent) system?
- *We would like to collaborate with the vendor in creating a strong taxonomy/indexing system within Laserfiche (or equal).*
54. Are there different document types that need to be sorted during the document preparation phase?
- *Yes - most departments have different document types.*
55. Do the documents have staples, paperclips and other binding material? If so, would you consider the staples to be light, medium or heavy?
- *Many files within the department's stored documents have staples, paperclips, or other binding material. Most of the staples would be considered "light."*
56. What % of the documents are double sided?
- *Currently unknown.*
57. Are the books that are mentioned in the RFP hard bound or soft bound? Do they need to be rebound?
- *Some of the books are able to be disassembled easily, and those can be disassembled and reassembled without having to be rebound. However, some of the older, historical books are hard bound and cannot be cut (meaning the pages will have to be scanned by opening the book).*
58. How should we name the files for the large format drawings?
- *We would like to collaborate with the vendor in creating a strong taxonomy/indexing system within Laserfiche (or equal).*
59. Do you want the files saved as PDF or Tiff?
- *We would like the files to be uploaded from the vendor into Laserfiche directly.*
60. Do you want the scanned files sent back to you on DVD's, hard drives or via SFTP?
- *We would like the files to be uploaded from the vendor into Laserfiche directly.*
61. Is there a color scanning requirement or should everything be scanned in black and white?
- *Color is preferable, but if black and white is more economical, then that might be considered as a suitable alternative.*

62. For the software platform, how many concurrent users will you have?
- *We would like to start with at least 5.*
63. Do you need a workflow module with this platform?
- *Currently that is not expected.*
64. Will you have a need for Electronic forms?
- *We are primarily interested in the electronic records management functionality.*
65. Will you need to have the ability for day-forward scanning for all 15 departments?
- *Yes – we would like to have the ability for our departments to be able to upload day-forward documents into Laserfiche or equal as soon as the department's taxonomy is created and the scanning has begun.*
66. When scanning the doc's into their OCR'd state, is a delivery in TIFF format acceptable? TIFF is the preferred format in Laserfiche systems.
- *Yes, TIFF or PDF would be fine, as long as it is acceptable and readable by Laserfiche or equal.*
67. In the section referencing the licensing costs of Laserfiche, what are the expected number of users that would need Full access (scan/import, view/search, edit) for the first project for the County clerk? How many users for future phases?
- *At least 5 to begin with, but going forward, more will likely have to be added.*
68. Are there any employees that would need to have a less active role in accessing documents but still have an occasional need? If yes, what would that number of users be for the first project? How many users for future phases?
- *None for the first project, however, for future phases, there will likely be employees that would only require 'read-only' access.*
69. Does the County have a preference for Laserfiche being a SaaS model, hosted, or On-premise?
- *Hosted or SaaS is preferable, but On-premise is also acceptable. Whichever solution is the most cost-efficient and effective will be the solution chosen.*
70. How much involvement with the upkeep of Laserfiche do you foresee from the Oconee County IT Dept?
- *We will likely have them manage most of the upkeep (updates, errors, etc).*
71. Does the County want to incorporate any forms automation into the new Laserfiche system in the first project?
- *No, we are interested primarily in the Records Management side of the software.*
72. Does Oconee want to incorporate any workflow automation into the new Laserfiche system in the first project?
- *No, we are interested primarily in the Records Management side of the software.*
73. Does Oconee County foresee any public facing functions with Laserfiche?
- *Currently, no – but we would like to have that option for the future.*
74. What are the indexing (metadata for each document) needs on this project per document type?

- *We would like the vendor to work with us to create a taxonomy/indexing system per department.*
75. Is the expectation that it will be all manual indexing, or do you have a database that will aid in automated indexing?
- *Expectation is currently manual indexing, but if the joint creation of a database for mutual indexing would significantly improve efficiency, then that solution would be acceptable.*
76. Will all documents be scanned in black and white, or is there a need for grayscale/color?
- *Color is preferable, but black and white is also acceptable if that is a more economically efficient option.*
77. Is secure shredding needed in terms of destruction?
- *Yes – secure shredding is needed, especially for documents that have Personally Identifiable Information.*
78. Do these clerks documents contain any social security, credit card, or any other non-public information?
- *The Clerk's documents do not, however, documents in other departments, (HR, Finance) will likely have sensitive non-public information in them.*

End of Questions/Answers

Please acknowledge all addenda by an authorized signature and date on the Addenda Acknowledgement Form