



Request for Proposal – Issued 11/11/22 Document Scanning

Proposal Requested

The Village of Shorewood is seeking proposals to digitally scan and index existing: 1) Village Board meeting minutes, ordinances, and resolutions, and 2) “property files” (building plans, permits and documents associated with each property in the village). The vendor will be required to index the files in a mutually agreed upon format, which is yet to be determined. Proposal cost should include the cost of scanning permanently retained documents housed in Village Hall which will be boxed and available to be taken off site for purposes of this task.

Project Background

The Village of Shorewood incorporated in 1917. There are Village Board meeting minutes, ordinances, resolutions, and property files related to approximately 3,850 Village properties dating back to that time. (Description of the documents is in Attachment A.) The overall objective is to scan these documents and store them in a digital format where they can be easily searched, retrieved, and made available to the public online. It is the Village’s intent to require all future documents to be submitted electronically, where possible. The Village intends to purchase a scanner and scan documents into the proposed solution when a document cannot otherwise be provided in a digital format.

Estimated Timeline

RFP issued	November 11, 2022
Deadline for proposal questions	November 17, 2022 (noon, CST)
Proposal question responses emailed	November 18, 2022
Proposals due	December 1, 2022 (noon, CST)
Firms notified of interview	December 9, 2022
Interviews	December 16, 2022
Recommendation on vendor	January 3, 2023
Village Board approval of contract	January 17, 2023

Interviews will be with staff and members and the Board chairperson of the recommending Board Committee. The Village will not be legally obligated to adhere to the dates for interviews, recommendations, and award. The Village reserves the right to accept or reject any and all proposals, and to select the proposal most advantageous to the Village of Shorewood.

Project Scope

The Village desires to scan, digitize and receive the digital files in two phases:

Phase I - scan, digitize and receive Village Board meeting minutes, ordinances, and resolution files.

Phase II - upon completion of Phase I, the Village will proceed with Phase II scan, digitize and receive all building files and permits for all properties in the Village.

The scope below is for both Phase I and Phase II, as the same tasks are required in each Phase.

Document Preparation for Scanning and Indexing

1. Vendor will be responsible for providing offsite scanning services for documents.
2. Offsite scanning services will provide secure document shipping and handling from Village Hall to their facility, as well as returning the documents to Village Hall.
3. The vendor will inventory and acknowledge the receipt of all items received. It is intended that the vendor will maintain a tracking system to allow for retrieval of any document that is in process. Any discrepancies between the Village's inventory transmittal and the items received by the vendor are to be resolved within ten calendar days.
4. Vendor will work with Village staff to mutually develop a procedure, as well as a pick-up and delivery schedule.
5. Document preparation includes, but is not limited to, straightening folded or rolled documents, removal of staples, binder clips or paper clips, removal of documents from binders or file folders and fasteners, or any other type of document retention faster.
 - a. Village Board meeting minutes are required to be placed back in their bindings upon completion of the scanning process.
 - b. Documents will be returned in original order, bindings, and folders.

Scanning Documents

1. Scanning of document in a PDF format with Optical Character Recognition (OCR), in black and white. Color copies shall be identified by the Village. Vendor must scan documents into electronic format at a resolution that supports full text search and is clearly legible.
2. Do not scan blank documents.
3. Vendor must ensure that all scanned documents have proper top-to-bottom orientation.
4. Unsatisfactory work products must be corrected at the vendor's expense, within an agreed and specified timeframe.
5. Duplex scan documents to capture both front and back of the document where needed.

Indexing Requirements

1. Vendor will work with the Village to develop a naming configuration and associated indexing fields.
2. The Village reserves the right to change the format to TIF/JPG and/or PDF at any time (file format should not be limited to the above-mentioned formats).
3. Vendor(s) will correct any errors in the indexing noted by Village at no charge.
4. The vendor(s) will verify both images and indexes prior to returning each to the Village.

Data Delivery

1. Vendor must submit scanned documents to the Village by portable device or other Village approved method of delivery.
2. Vendor must work with the Village to ensure data transmits and is in a usable format.

Proposal Content

The proposal should address the following:

1. Transmittal Information
 - a. Firm's name, address, telephone number and lead contact person.

2. References/Experience

- a. Three client references (name/email/phone) for similar projects in size and scope successfully completed by the proposing firm or individual within the last five years.
 - b. Describe qualifications and experience to perform the work described in the Scope of Work. Experience should include direct experience with the specific subject matter, noting state or local government and County experience if applicable.
3. Qualifications/Experience of Key Personnel
- a. Qualifications and experience of key personnel who will be assigned to this project. This includes personnel to perform management of the project and individuals that will have the most contact with the Village during this project and any proposed subcontractors.
 - b. If the project is to be accomplished through an affiliation or joint venture, the names and addresses of those firms must be furnished, including the roles and responsibilities for each. Additionally, for each affiliated firm or joint venture participant, the information regarding experience and qualifications described in (a) above, must be provided.
4. Plan Approach and Timeline
- a. A descriptive narrative of your proposed approach to successfully perform the project, including a specific description or list of any exceptional, value-added features or capabilities beneficial to the Village the proposal brings to the project.
 - b. Provide a proposed work plan which includes a detailed outline of the time commitment for each phase of the scope of work broken down by tasks, milestones, and duration.
5. Cost
- a. Provide a cost for Phase I and Phase II.
 - b. Please note there will be no reimbursement for travel time, meals, or mileage; these incidental costs should be included in the rates.
 - c. Describe the circumstances under which you would propose to modify the fees, and how you would communicate such a potential modification to the Village of Shorewood.
6. Contract
- a. Please attach a copy of your standard contract for these types of services in the email submitting the proposal.
7. Insurance
- a. The proposal must include either a description of the firm's insurance or a certificate of insurance outlining the firm's insurance policies which evidence compliance with the requirements noted in the *Terms and Conditions* section of this RFP.

Terms and Conditions

Payment Terms

All invoices for services will be processed within 30 days, pending verification and the receipt of any required documentation of services provided in accordance with the terms of the agreement. If approved service agreement identifies labor services to be paid hourly, invoice must specify deliverable(s) completed and performed as well as any additional costs for equipment or materials. Invoice will be paid upon completion of each phase unless specified differently in the service agreement. If approved service agreement identifies annual flat fee for services, the Village ask to receive monthly invoices based on equal installments over the contract period.

Insurance

The successful firm shall agree that it will, always during the term of the agreement, keep in force and effect insurance policies required by the contract, issued by a company or companies authorized to do business in the
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State of Wisconsin and satisfactory to the Village. Such insurance shall be primary. Prior to execution of the written contract, the successful firm shall furnish the Village with a Certificate of Insurance listing the Village as an additional insured 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 nonrenewal during the term of the agreement. Failure to submit an insurance certificate, as required, can make the contract voidable at the Village's discretion. Additionally, the Firm shall not allow any subcontractor to commence work until the aforementioned documents, where applicable, have been obtained from the subcontractor and approved by Village of Shorewood.

Nondiscrimination

In connection with the performance of work under this agreement, the Firm agrees not to discriminate against any employee or applicant for employment because of age, race, religion, color, marital status, sexual orientation, sex, disability, national origin or ancestry. This provision must be included in all subcontracts.

Assignment or Subcontract

The contract may not be assigned or subcontracted by the firm without the written consent of the Village. If all or a portion on the contract work is proposed to be assigned or subcontracted, the name of the individual(s) to complete the work, address and firm proposed shall be submitted within the scope of the proposal.

Independent Contractor Status

The firm agrees that it is an independent Contractor with respect to the services provided pursuant to this agreement. Nothing in this agreement shall be considered to create the relationship of employer and employee between the parties.

Amendments to Contract

This contract may be modified only by written amendment to the contract, signed by both parties.

Waiver

One or more waivers by any party of any term of the contract will not be construed as a waiver of a subsequent breach of the same or any other term. The consent or approval given by any party with respect to any act by the other party requiring such consent or approval shall not be deemed to waive the need for further consent or approval of any subsequent similar act by such party.

Indemnification and Defense of Suits

The firm agrees to indemnify, hold harmless, and defend the Village, its officers, agents and employees from any and all liability including claims, demands, damages, actions or causes of action, together with any and all losses, costs, or expense, including attorney fees, where such liability is founded upon or grows out of the acts, errors, or omissions of the firm, its employees, agents or subcontractors.

Contract Period

The term of this contract will be 2023 to complete the contracted services.

Termination of Contract

To be defined in the contract document.

Professional Services Contract

If your proposal is accepted and a contract is issued, then this Request for Proposal and all documents attached hereto including any amendments, the firm's technical and price proposals, and any other written offers/clarifications made by the firm and accepted by the Village, will be incorporated into a contract between the Village and the firm, it shall contain all the terms and conditions agreed on by the parties hereto, and no other

agreement regarding the subject matter of this proposal shall be determined to exist or bind any of the parties hereto.

The submission of a proposal shall be considered as a representation that the firm has carefully investigated all conditions, has full knowledge of the scope, nature and quality of work required, and is familiar with all applicable State, Federal and Local regulations that affect, or may at some future date affect the performance of this contract.

Acceptance of this proposal will take place only upon award by the Village Board, execution of the contract by the proper Village officials, and delivery of the fully executed contract to the firm. Acceptance may be revoked at any time prior to delivery of the fully executed contract to the successful firm. The contract may be amended only by written agreement between the firm and the Village of Shorewood.

Selection Criteria

Village staff will consider the following in evaluation of the proposals:

1. Past record of performance of the contractor and team on similar projects.
2. Quality and content of the written proposal.
3. Experience and technical competence of the individuals assigned to the project.
4. The contractor's approach to the project, including the Village's confidence in the vendor's ability to satisfactorily perform the work.
5. Participation of Disadvantaged Business Enterprises.
6. Cost.

Instructions to Firms

Submittal Instructions

1. Please provide (1) digital copy of the proposal via email only to:
Rebecca Ewald, Village Manager
rewald@shorewoodwi.gov
Deadline: December 1, 2022 – Noon
2. Proposals will be accepted on or before the deadline identified above. Proposals received after that date and time will be rejected. Proposals will not be opened publicly.
3. Questions regarding this RFP should only be directed to staff member identified above. Contact with elected officials, committee members and other staff members is grounds for disqualification.

This RFP does not commit the Village 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 Village 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 the Village of Shorewood to do so.

Amendments

Amendment of proposals may be done as follows:

By Village: Proposals may be amended by the Village in response to need for further clarification, specifications and/or requirements changes, new opening date, etc. Copies of the amendment will be mailed to prospective vendors.

By Firm: Proposals may only be amended after receipt by the Village 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 Village.

Proposals may be withdrawn only in total, and only by a written request to the Village prior to the time and date scheduled for opening of proposals.

Contract Administration

The staff member is the primary contact for contract administration of this proposal:

Rebecca Ewald, Village Manager
rewald@shorewoodwi.gov
414-847-2701

In the absence of the primary contract, the secondary contact for contract administration is:

Chris Anderson, Assistant Village Manager
canderson@shorewoodwi.gov
414-847-2705

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ATTACHMENT A

Village Board Minutes Description

Books 1-24 are large (8.5 x14 inches) leather books which have glued bindings and are handwritten. Many of the pages are brittle, and although the binding seems to be holding securely, the leather is deteriorating. In addition to the minutes, pertinent supporting documents are included and are pasted or taped. These early books not only contain meeting minutes, but lists of receipts, bids, salaries, specifications for walkways, sewers and streets, lighting, lot definitions, some ordinances, and some resolutions (Years 1901-September,1922).

Books 25-51 are also large (8.5 x14 inches) leather books which have glued bindings and include handwritten and/or typed. pasted, taped, or stapled items, and mimeographed sheets that are blurred. These also contain extra items like those mentioned above. Their condition mirrors Books 1-24. These books encompass November 1922-April 1935.

Books 52-70 are larger (9 x 16 inches) and leather but are bound with metal strips. These minutes are typed and contain minutes and extras from May 1935-July 1967.

Beginning in August 1967 a new format was used, and the minutes are in conventional three ring binders (8.5 x 11 inches), typed. These books are not actually numbered but have the dates on the binders, and for consistency are referred to as Books 71-100. These are minutes of the meetings only, and do not contain other articles like those mentioned above.

A year of minutes usually contains between 150-250 pages, depending on the subjects discussed. Originally, they were typed on both sides, so that ten sheets of paper would result in a count of twenty scanned pages, but this soon evolved to only one side being used. The last seven years include the relevant agendas. (Books 96-100, 2015-2021)

Although the handwritten volumes may or may not be capability of OCR, they could be possibly scanned as pictures to preserve them. The last fifty years could easily be digitized and probably contain the most relevant and most often referred to information.

Building Plans and Permit Description

- 35 drawers of property files with approximately 65 files per drawer of building permits, but not plans, and plumbing/hvac/electrical/other permits in size 8 ½ x 11 or 11 x 17. We have removed the staples from the documents.
- 38 file drawers in the basement, primarily with building permits including the plans with oversized (24" x 36") folded plans with staples. We also have 56 "cubbies" of rolled plans (24" x 36") of various sizes/pages, and 32 miscellaneous draws of files.
- There are approximately 3,850 parcels with improvements located in the Village.

Volume	Contents	Pages
Book 1	1901-April,1903	230
Book 2	April 1903-Sept.1905	290
Book 3	Sept.1905-May, 1908	280
Book 4	Mqy 1908-April 1910	320
Book 5	May 1910-May 1911	300
Book 6	May 1911-January 1912	290
Book 7	February 1912-November 1912	300
Book 8	December 1912-November 1913	300
Book 9	November1913-June 1914	300
Book 10	June 1914-November 1914	300
Book 11	November 1914-May 1915	290
Book 12	June 1915-October 1915	300
Book 13	October 1915-December 1915	300
Book 14	January1916-June 1916	300
Book 15	June1916-October 1916	300
Book 16	November 1916-March 1917	300
Book 17	April 1917-November 1917	300
Book 18	December 1917-August 1918	300
Book 19	September 1918-September 1919	300
Book 20	September 1919-September 1920	300
Book 21	September 1920-June 1921	300
Book 22	June 1921-October 1921	300
Book 23	October 1921-May 1922	300
Book 24	May 1922-November 1922	300
Book 25	November 1922-May 1923	300
Book 26	May 1923-September 1923	300
Book 27	September 1923-April 1924	300
Book 28	April 1924-August 1924	300
Book 29	August 1924-November 1924	300
Book 30	November 1924-April 1925	300
Book 31	May 1925-September 1925	300

Volume	Contents	Estimated Pages
Book 32	September 1925-April 1926	300
Book 33	May 1926-August 1926	300
Book 34	August 1926-February 1927	300
Book 35	February 1927-July 1927	300
Book 36	July 1927-October 1927	300
Book 37	October 1927-March 1928	300
Book 38	March 1928-August 1928	300
Book 39	August 1928-April 1929	300
Book 40	May 1929-September 1929	300
Book 41	September 1929-November 1929	300
Book 42	November 1929-June 1930	300
Book 43	June 1930-September 1930	300
Book 44	September 1930-April 1931	300
Book 45	April 1931-August 1931	300
Book 46	August 1931-November 1931	300
Book 47	November 1931-June 1932	300
Book 48	June 1932-February 1933	300
Book 49	February 1933-November 1933	300
Book 50	November 1933-September 1934	300
Book 51	October 1934-April 1935	300
Book 52	May 1935-August 1936	300
Book 53	August 1936-November 1937	400
Book 54	December 1937-April 1939	400
Book 55	May 1939-January 1941	400
Book 56	February 1941-September 1942	400
Book 57	September 1942-February 1945	400
Book 58	February 1945-July 1947	400
Book 59	August 1947-August 1949	400
Book 60	August 4-1949-September 1951	400

Volume	Contents	Estimated Pages
Book 61	October 1951-August 1953	400
Book 62	September 1953-October 1955	400
Book 63	October 1955-October 1957	400
Book 64	October 1957-May 1959	400
Book 65	May 1959-April 1961	400
Book 66	May 1961-February 1963	400
Book 67	March 1963-July 1964	400
Book 68	July 64-September 65	400
Book 69	September 65-December. 66	400
Book 70	January 66-July 1967	130
Book 71	August 67-December 67	130
Book 72	1968-69	400
Book 73	1970-71	400
Book 74	1972-73	300
Book 75	1974	200
Book 76	1975	250
Book 77	1976	250
Book 78	1977	250
Book 79	1978-79	400
Book 80	1980-81	320
Book 81	1982	250
Book 82	1983-84	400
Book 83	1985-86	250
Book 84	1987	190
Book 85	1988	190
Book 86	1989-90	200
Book 87	1991-92	250
Book 88	1993-95	300
Book 89	1996-99	300
Book 90	2000	150

Volume	Contents	Estimated Pages
Book 91	2001-03	400
Book 92	2004-06	500
Book 93	2007-09	500
Book 94	2010-12	500
Book 95	2013-14	300
Book 96	2015-16	400
Book 97	2017	250
Book 99	2019-20	130
Book 100	2021	250