

***City of Everett***  
**Request for Qualifications**

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**RFQ No. 2008-082**

**Consultant to Prepare  
Document Management and  
Imaging Business Requirements Analysis**

City of Everett  
Purchasing Division  
3200 Cedar Street  
Everett WA 98201  
(425) 257-8840

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**REQUEST FOR QUALIFICATIONS**  
RFQ No. 2008-082  
Consultant to Prepare  
Document Management and  
Imaging Business Requirements Analysis

## **INTRODUCTION**

Sealed Statements of Qualifications will be received by the **City of Everett, City Clerk, 1st Floor, 2930 Wetmore Avenue, Everett, Washington 98201** until 2:00 p.m., September 9, 2008 for a Consultant to Prepare a Document Management and Imaging Business Requirements Analysis for the City of Everett.

## **OVERVIEW**

The City of Everett is looking for a consultant to review and analyze the City's enterprise wide document management, imaging and records management business needs as well as related department level business needs. This needs analysis will focus primarily on document management, imaging, and records management needs. Workflow, document sharing and collaboration needs will be a secondary focus. The results of this business needs analysis along with recommendations and budget implications will be compiled into a Business Requirements Analysis Report which will be presented to the City Technology Steering Committee for further direction and action. The Business Requirements Analysis Report will be used as the basis for a potential vendor neutral RFP.

The City of Everett has a population 101,000 with 1,100 full time employees. The City currently has three separate, stand alone document management/imaging systems along with multiple manual document management processes.

## **PURPOSE**

The City of Everett is requesting Statements of Qualification from consultants with expertise in document management, imaging, records management, workflow, document sharing and collaboration in a municipal government environment.

The consultant will report to the Information Technology Director, and will work with the Director, project team and department representatives for the business needs analysis.

The Consultant will be required to provide at minimum the following services and deliverables:

- Conduct a detailed business and user needs analysis.
  - This analysis will include interviews with representative departments to collect specific business and technical needs. Those departments will include, but not be limited to:
    - City Clerk's Office
    - Legal Department
    - Municipal Court
    - Police Records
    - Public Works Records
- Review existing City document management and imaging systems.
- Specify system requirements, such as:
  - Data storage
  - Network hardware
  - Servers
  - Scanners
  - Document, imaging and records management software
- Determine implementation and integration services requirements.
- Provide a Business Requirements Analysis Report that includes business needs analysis results and recommendations along with technical requirements and cost estimates.
  - This report will be used as a tool for presenting findings to City Administration.
  - This report will also need to contain sufficient detail to be the basis for a vendor neutral RFP.

A benchmark analysis of comparable municipalities' use of document management and imaging services may also be included.

The City would like to see a budget that breaks out the costs for consultant services that may be optional, allowing us to adjust the budget as necessary.

The City is seeking a consultant with experience and expertise in business and user needs analysis as well as document management, imaging and records management to help us determine our requirements. The consultant should be able to communicate well with a variety of constituencies, including Information Technology, Administration and other City staff. We would like to begin our needs analysis process in October of 2008.

## **RFQ COORDINATOR**

Upon release of this Request for Qualifications (RFQ), all vendor communications concerning this process must be directed to the RFQ Coordinator listed below:

Hope Hambridge, CPPB  
City of Everett Purchasing  
3200 Cedar Street, Everett WA 98201  
Phone: (425) 257-8905  
Fax: (425) 257-8864  
ahambridge@ci.everett.wa.us

Unauthorized contact regarding the RFQ with other City of Everett employees may result in disqualification. Any oral communications will be considered unofficial and non-binding on the City of Everett. Vendors should rely only on written statements issued by the RFQ Coordinator.

## **ADDENDA**

Changes to this RFQ will be made only by formal written addenda issued by the RFQ Coordinator named above.

Respondents are responsible to check the City of Everett website for the issuance of any addenda prior to submitting a statement.

The address is <http://www.ci.everett.wa.us/bidscontracts/bids.asp>.

## **STATEMENT RESPONSE DATE AND LOCATION**

The City Clerk must receive the vendor's Statement of Qualifications in a sealed envelope, in its entirety, not later than 2:00 p.m., Pacific Time in Everett, Washington, on September 9, 2008. Statements arriving after the deadline will be returned unopened to their senders. All statements and accompanying documentation will become the property of the City of Everett and may not be returned. Statements must be clearly marked:

<p style="text-align: center;"><b>STATEMENT OF QUALIFICATIONS FOR Consultant to Prepare Document Management and Imaging Business Requirements Analysis RFQ NO. 2008-082</b></p>
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Vendors assume the risk of the method of dispatch chosen. The City of Everett assumes no responsibility for delays caused by any delivery service. Postmarking by the due date will not substitute for actual statement receipt. Statements will not be accepted late nor will additional time be granted to any vendor. Statements may not be delivered by facsimile transmission or other telecommunication or solely by electronic means.

## **SCHEDULE**

RFQ Release:	August 1, 2008
Deadline for Questions:	August 15, 2008
RFQ Due Date:	September 9, 2008, <b>2 p.m. Pacific Time</b>

Schedule is subject to change.

## **NON-ENDORSEMENT**

As a result of the selection of a vendor to supply products and/or services to the City of Everett, the City of Everett is neither endorsing nor suggesting that the vendor's product/service is the best or only solution. The vendor agrees to make no reference to the City of Everett in any literature, promotional material, brochures, sales presentation or the like without the express written consent of the City of Everett.

## **PROPRIETARY MATERIAL**

Any information contained in the Statement of Qualifications that is proprietary must be clearly designated. Marking the entire statement as proprietary will be neither accepted nor honored. If a request is made to view a vendor's statement, the City of Everett will comply according to the Open Public Records Act, chapter 42.17 RCW. If any information is marked as proprietary in the statement, such information will not be made available until the affected vendor has been given an opportunity to seek a court injunction against the requested disclosure.

## **RESPONSE PROPERTY OF THE CITY OF EVERETT**

All materials submitted in response to this request become the property of the City of Everett. Selection or rejection of a response does not affect this right.

## **NO OBLIGATION TO BUY**

The City of Everett reserves the right to refrain from contracting with any vendor. The release of this RFQ does not compel the City of Everett to purchase.

## **COST OF PREPARING STATEMENTS**

The City of Everett is not liable for any costs incurred by vendors in the preparation and presentation of statements and demonstrations submitted in response to this RFQ.

## **NUMBER OF COPIES REQUIRED**

Vendors should submit (1) one original statement and (6) six copies and (1) one electronic copy on CD. The electronic copy must be either MS Office (e.g. Word or Excel) or Adobe Acrobat PDF file format is required.

## **SUBMITTAL INFORMATION**

Respond to all sections in their entirety and submit your response on standard 8.5 x 11 paper. Title each page with your company name and note the section number and the question number for each response.

Statements must include the attached Certification or they will be deemed non-responsive and will not be evaluated.

## **SUBMITTAL AND EVALUATION**

Statements of Qualification will be evaluated on the completeness of the information supplied in the Information/Response Packet. For full consideration, Statements should include responses to Sections 1 through 4. The Evaluation Team (which shall include, but not be limited to, representatives from City Administration, City IT and various user departments) will rank the responses based on the criteria listed below. The City and the successful respondent will negotiate an agreement based on the attached Professional Services Agreement.

Evaluation Scale - A numerical scale will be used to score each section. The total score for each section will not exceed the maximum number of points set for that section. Scoring will be as follows:

<b>Section 1</b>	<b>Company Information &amp; References</b>	<b>10 points</b>
a.	Company Name Street Address City, State, Zip Code	
b.	Billing address if different from above	
c.	List your last three customers.	
d.	References: Please provide at least three references from organizations of similar size for which you have provided document management and imaging consulting services of similar scope. References from similar size municipalities are preferred.	

**Section 2 Document Management, Records Management and Imaging Consulting Experience 50 points**

Please provide a brief description of the type of document management, imaging and records management consulting services you could provide for the City of Everett, being sure to respond to parts a through g.

- a. Experience with departmental document management and imaging needs analysis
- b. Experience with incorporating individual departmental needs into an overall enterprise solution
- c. Collating, organizing and documenting interview and needs analysis results
- d. Working with the project team to develop and document short term and long term recommendations
- e. Developing implementation measures
- f. Documenting interview and needs analysis results along with recommendations and cost estimates in a clear and concise manner that can be used as the basis of a vendor neutral RFP document
- g. Experience with document management and imaging business needs analysis processes in a municipal environment

**Section 3 Availability, Involvement, and Support for Project Team 20 points**

Indicate when you would be available to begin working with the City, and your timeline for the document management and imaging consulting process. Additionally, we would like to know if your team members will be available to meet on-site to perform departmental interviews and attend project meetings.

- a. Consultant availability
- b. On-site meetings
- c. Timeline indicating length of process

**Section 4 Budget 20 points**

Please indicate the costs for your services with a breakdown by type of service provided.

## **SELECTION PROCESS**

The City will select the Statements that, in its sole discretion, are the most advantageous to the City. The City reserves the right to make an award without further discussion of the Statements submitted; there may be no best and final offer procedure. Therefore, the Statements should be initially submitted on the most favorable terms the vendor can offer. The specifications may be altered by the City of Everett based on the vendor's qualification, and an increase or reduction of services with the proposer may be negotiated before contract signing, award, and execution.

The team will score each Statement and may invite the top 1-3 firms for an interview. The interview will be scripted by the evaluation team to allow firms to demonstrate how typical City of Everett functions are performed. In addition to the interview, the evaluation team will query customers and may make site visits to evaluate vendor performance, congruence with stated capacities, and conversion plans.

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The undersigned hereby declares that he or she is duly authorized to complete and submit this Statement of Qualifications and that the statements contained herein are true and correct as of the date set forth below. Incomplete, incorrect or misleading information will be reason for a determination by city of non-responsibility.

Dated this \_\_\_\_\_ day of \_\_\_\_\_, 2008

By: \_\_\_\_\_  
(Signature of authorized representative)

Name: \_\_\_\_\_  
(Please print)

Title: \_\_\_\_\_

For: \_\_\_\_\_