

Superintendent  
Ken Kenworthy



# Okeechobee County School Board

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**Vice Chairperson**  
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## Request for Qualifications (RFQ)

**RFQ #21/22-04**

Release Date: June 15, 2022

### Digital Records Management Solution

Notice is hereby given that the Okeechobee County School Board (herein after referred to as "Okeechobee County School Board" or "the District") intends to select a qualified service provider for the provision of a digital records management solution. The purpose of this solicitation is to provide a pool of service providers to accommodate the District with scanning active and inactive personnel files, archiving this information in a database, and providing solutions for digitizing and retrieving personnel files.

A proposal in response to this RFQ must be submitted to Okeechobee County School Board, Human Resources Department **ATTN: Joseph Stanley**, 700 SW 2<sup>nd</sup> Avenue, Okeechobee, FL 34974, no later than 5:00 PM EST on June 29, 2022.

#### **RFQ #21/22-04 – Digital Records Management Solution**

The responsibility for submitting a response to this RFQ to the Okeechobee County School Board Human Resources Department, on or before the stipulated time and date will be solely and strictly the responsibility of the Proposer. Okeechobee County School Board will in no way be responsible for delays caused by the United States Postal Service or by any other delivery service or occurrence. Any proposals received after the stipulated time and date will not be accepted, and/or opened and will be returned to the Proposer.

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## **SECTION 1 - REQUEST FOR QUALIFICATIONS (RFQ)**

Firms interested in providing a DIGITAL RECORDS MANAGEMENT SOLUTION to the Okeechobee County School Board are hereby notified that a sealed Proposal for providing the requested services in response to this RFQ will be accepted until time and date listed within the schedule in Section 2 and must be received by mail or delivered by hand to the following location. Proposals received after this deadline will not be accepted.

**Okeechobee County School Board  
Human Resources Department  
Attn: Joseph Stanley  
700 SW 2<sup>nd</sup> Avenue  
Okeechobee, FL 34974**

The Proposal is limited to 10 informational pages and shall be presented in a binder format. Four (4) copies, one (1) original marked “original” and three (3) copies of the Proposal, shall be signed by a person(s) legally authorized to bind the firm and submitted in a sealed package clearly labeled with the RFQ number and the name of the submitting firm. In addition, one (1) flash drive shall accompany the Proposal submittal.

The format of the Proposal shall be in strict conformance to stipulated criteria in Instructions to Submitting Firms (Section 3) and the Evaluation Criteria (Section 4).

## **SECTION 2 - SCOPE OF SERVICES**

### Background

The Okeechobee County School Board is located in rural south-central Florida. A public school system, the District serves 6,600 students in grades PreK-12 across ten school sites. These sites include five elementary schools, two middle schools, one freshman campus, one traditional high school, and one alternative high school. The District is also the county’s largest employer, with approximately 1,000 full-time, part-time, and temporary employees. As an organization, the Okeechobee County School Board strives relentlessly to streamline its operations to make our work and services as efficient and cost-effective as possible. Given the length of time the District has been in operation, the district has a significant number of personnel files for both active and inactive personnel in administrative, instructional, and classified employee types.

### Scope of Work

The scope of work is the provision of digital records management services for the Okeechobee County School Board. The solution must also allow scanning, storage, indexing and retrieval of sensitive and confidential information, will ensure the integrity and continuity of recordkeeping practices, and will align with approved retention periods. The solution will efficiently capture information and automate classification, eliminating the need for manual handling and processing. The digital record management system will protect records in the event of a disaster or an unplanned emergency event and will be protected from access by unauthorized individuals. The system will also provide professional development and training services, as well as assistance in converting existing paper documents to digital formats.

Utilizing a standard box size of 10”x12”x15”, the existing files number as follows: Active Personnel – 107 and Inactive Personnel – 223. Inactive files may be scanned at the box level, but all active files must be scanned at the folder level. The solution must arrange for all materials to be packed and shipped to a scanning facility. In addition, while files are being scanned, they must be available to the district upon request within 24 hours. Finally, upon completion of the scanning and indexing process, the files must be securely destroyed in keeping with Florida Records Retention guidelines and certification of this destruction must be provided to the District.

The file management solution must accommodate an application programming interface (API) connection with our Human Resources Information System, Skyward. The term of the licensing agreement of this item shall be for three (3) years with annual options to renew, based on satisfactory performance from the Vendor, commencing upon notification of award. If the vendor’s platform is considered “Unsatisfactory” by the District, the District shall have the right to terminate this Agreement and any agreement associated with this project. In the event that either party elects to terminate this Agreement, the District shall be provided all records, without cost. These records shall be provided at the file level (unless the document was originally scanned at the drawer/box level) and in PDF format with all associated metadata.

Services would begin within two weeks of School Board approval of accepted bid (likely mid-to-late July 2022).

## **Implementation Plan**

The Vendor is to provide an implementation plan in a narrative format supported by an activity-level project plan that details how the proposed solution will be implemented. This implementation plan should include but is not limited to the following elements:

### **General Implementation Approach**

- Provide a general overview of the implementation approach you plan to use for the District that includes addressing the following items:
  - Describe your recommended approach for this implementation

### **Project Management Approach**

- Provide a high-level work plan for achieving the successful deployment of your proposed solution.

### **Report Development**

- Custom reporting may be needed.
- What are the query tools and report writers that the Vendor is proposing?
- What reports are available out of the box? Provide a list and samples as part of your proposal.

### **Application and Data Integrations/Interface**

In general, employee data should be entered only once into the District's Skyward HRIS system.

- Has your solution ever pulled data from the Skyward HRIS system?
- Describe the tools and methods of how your solution interfaces with data from Skyward HRIS.

### **American with Disabilities Act**

- Does your solution have the ability to ensure that the software complies with accessibility standards? To comply with the Americans with Disabilities Act (ADA), information technology must be accessible to people with disabilities. And the information technology accessibility level must comply with accessibility standards set forth in Section 508 of the Rehabilitation Act. Section 508 requires that Federal agencies' electronic and information technology is accessible to people with disabilities

### **Data Security**

- All information/data uploaded to proposed solution will be owned by the District
  - At the termination of the contract between the District and vendor, the Vendor will provide the District with all files/records in a format agreed upon in the contract.
- Please describe how data privacy and security compliance is supported within your proposed solution. Is the system HIPAA compliant?
- What data security and system redundancy capabilities are available at Proposer's data center and storage facilities?
- Please describe your logical security, including firewall security, authentication controls, and data encryption capabilities. Will data be encrypted at rest and in transit? Please explain any applicable protocols.
- Describe your systems administration/management capabilities including monitoring of performance measures, intrusion detection, and error resolution.
- Please provide a copy of your most recent SSAE 16 Type II audit

### **Disaster Recovery Plan**

- What disaster recovery services are provided under your standard hosting agreement? If there is no standard, is there a separate agreement/cost associated with disaster recovery?

### **Training**

The District intends to explore the advantages, disadvantages, and related costs of two implementation training approaches:

- End-User Training Approach: All end-user and technical training will be performed on-site or virtual through implementation and be performed by the Vendor.
- End-user implementation training will be provided by the Vendor and include joint participation by the relevant District process owner(s) team lead.
- Train the Trainer Approach: The Vendor will incorporate a "train the trainer" approach where only key District team leads will be trained through implementation, and then they will train the remainder of the staff in their respective areas.
- The vendor should provide an overall description of both training modules, including general time frames in which both types of training will be conducted and a description, level, and amount of training.

## **System Documentation and Manuals**

The Vendor is expected to provide user manuals and online help for use by the District as part of the initial training and ongoing operational support. Additionally, the Vendor is expected to provide technical documentation.

- Describe what documentation (user guide, technical guide, training materials, etc.) is available on the system proposed and any related costs.
- Describe that type of documentation you anticipate developing during the course of the project.

## **Knowledge Transfer**

- The Vendor should describe their process for ensuring that a transfer of knowledge occurs back to the District staff such that the staff is capable of supporting and maintaining the solution in the most proficient manner once the Vendor implementation engagement is complete

## **Change Management Approach**

The District recognizes that a movement from the current environment to such a solution will present change management challenges. The Vendor should clearly identify their approach toward change management, including any unique approaches or tools that will be used.

## **Testing**

The Vendor should describe their recommended approach to the following types of testing that are anticipated to be performed on the project and the type of assistance they anticipate providing to the District.

- System testing
- Interface/Integration testing
- Stress/Performance testing
- User acceptance testing

The Vendor should not be constrained to only include the above items in the Vendor's proposal response if the Vendor feels that additional elements may add value to the overall implementation. It is expected that Vendor will lead the efforts in each of the implementation areas.

## **Staffing & Ongoing Support Plan**

### **Staffing Plan**

The Vendor must detail the type and amount of implementation support to be provided (e.g., number of personnel, level of personnel, time commitment, etc.). If Vendor is using a subcontractor, please include the information on subcontracting staff being used and their specific role on the project. Please provide an overall project organization structure for the District staff involvement during the project along with identifying their role and responsibilities.

### **Ongoing Support Services**

Please specify the post-implementation support options including:

- Post-go live support that is included in the proposed solution
  - Provide the minimum, maximum and average response times (hours) provided as part of the basic support agreement and average response time for the past twelve (12) months.
- Onsite support
- Telephone support
  - Do you limit the number of District staff who can call in for support? If yes, explain your model and how additional staff can be included, and at what incremental cost. If there is no limitation, the maintenance agreement should clearly state this fact.
  - Describe the types of support needed to keep the product under current support and to keep the product enhanced.
- Help Desk services (If there is a service level agreement for your Help Desk, please provide a copy with your RFQ response)
  - Specify days and hours and any escalation options and procedures.
- Toll-free support line
- User group (i.e., information about it, where it is held, and when. If not, are you planning one?)
- Online knowledgebase (i.e., how it is accessed, who updates it, etc.)

## **Questions**

1. How many instances of unplanned outages have any of your customers experienced within the past five years?
  - a. What has been the duration and scope of such unplanned outages?
  - b. What availability and response time do you guarantee?
2. Describe your maintenance programs and options associated with pricing.
3. Describe the product release cycle including:
  - a. Frequency of upgrades/enhancements or new versions (major and minor version releases)
  - b. How long does a release take to implement, and
  - c. Use of release notes
4. Customizations

- a. How does the Vendor define customization versus configuration?
- b. How are local customizations or configurations maintained when installing new releases of the Vendor's software?

**Schedule**

The following dates and activities identify proposed project schedule milestones (subject to modification by Okeechobee County School Board):

Advertisement/RFQ	June 15, 2022
Cutoff for Questions	June 22, 2022
Deadline for Response to Questions	June 24, 2022
Deadline for Qualification Responses/Bid Opening	June 29, 2022 – 5:00 PM EST
Rating of Initial Proposals by Selection Committee	June 30, 2022
Recommendation of Selected Firms Finalized	July 21, 2022
Board Approval of Selected Firms	July 21, 2022
Board Approval of Master Agreement with Selected Firm	July 21, 2022

**SECTION 3 - INSTRUCTIONS TO SUBMITTING FIRMS**

**A . Purpose**

The intent of this Request for Qualifications (RFQ) is to retain a firm to provide digital records management services on an as-needed basis for the Okeechobee County School Board.

**B . Questions**

Any questions, requests for clarifications or interpretations regarding this RFQ during the submittal preparation period (or reporting errors, inconsistencies, or ambiguities) must be submitted in writing to Dr. Joseph Stanley, Director of Human Resources, via email to joseph.stanley@okee.k12.fl.us no later than the date and time listed in Section 2. No questions or clarifications will be considered after that date and time. Questions must be typed or printed. Responses will be posted as an addendum and made available on the Human Resources Department page on the OCSB website (www.okee.k12.fl.us).

**C . Required Submittal Format**

Proposers interested in being considered for these services shall submit a total of four (4) copies, including the one (1) response marked "Original", and one (1) flash drive containing all original documents of the required response to the Request for Qualifications (RFQ) and shall be signed by a person(s) legally authorized to bind the firm.

To facilitate analysis of its submittal, the firm must prepare its proposal in accordance with the criteria outlined in Section 4. **Proposals shall respond to each of the Criteria in the same order listed and use tabs to identify each section.** The Proposal is **limited to 10 informational pages.** Proposals shall be submitted in a sealed package clearly labeled with the RFQ number and the name of the submitting firm.

Okeechobee County School Board emphasizes that the Proposer concentrate on accuracy, completeness, and clarity of content. The Proposer must use sections and tabs that are clearly identified and must number and label all parts, pages, figures, and tables in its proposal.

If a firm's proposal deviates from these instructions, such proposal may, in Okeechobee County School Board's sole discretion, be rejected.

**D . General Conditions for Submissions**

1. Issuance of the RFQ does not constitute a commitment by Okeechobee County School Board to award a contract. Okeechobee County School Board reserves the right to reject any or all submissions received in the response to the RFQ, cancel the RFQ, or waive any technicalities or formalities when and if it is deemed in the best interest of Okeechobee County School Board to do so.
2. The award of any contract hereunder is subject to the provisions of Chapter 112, Florida Statutes (Florida Statute 112.313). Proposers must disclose with their Proposal the name of any officer, director, partner, proprietor, associate, or agent who is also an officer or employee of Okeechobee County School Board. Further, all Proposers must disclose the name of any officer or employee of Okeechobee County School Board who owns, directly or indirectly, any interest in the Proposer's firm or any of its branches or affiliate companies.
3. A person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a proposal on a contract to provide any goods or services to a public entity, may not submit a proposal on a contract with a public entity for the construction or repair of a public building or public work, may not submit proposals on leases of real property to a public entity, may not be awarded or perform work as a contractor, supplier,

- subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in s. 287.017 for CATEGORY TWO for a period of 36 months from the date of being placed on the convicted vendor list. (F.S.287.133). By submitting a proposal, the Proposer represents that restrictions related to public entity crimes stated in Section 287.133(2) (a), Florida Statutes, do not apply to either his/her own company, or that of his/her subcontractors or suppliers.
4. Okeechobee County School Board reserves the right to request clarification of information submitted and to request additional information from one or more firms.
  5. All Proposals become the property of the Okeechobee County School Board upon receipt and will not be returned to the Proposer.
  6. Okeechobee County School Board operates under the public disclosure laws required of governmental agencies. Proprietary firm information must be identified and will be protected to the greatest extent possible, but must be disclosed by Okeechobee County School Board upon receipt of a Public Records Request.
  7. By making a submission, the Proposer agrees to comply with all applicable federal, state, and local statutes and regulations.
  8. Okeechobee County School Board accepts no responsibility for any expenses incurred by those Proposers offering their services in the preparation of a response to either this RFQ or subsequent requests. All submitting expenses shall be borne by the offering Proposer exclusively.
  9. The successful Proposer shall obtain approval from Okeechobee County School Board prior to reassigning any key staff involved in the performance of this service as shown in the submission.
  10. The successful Proposer will also obtain approval from Okeechobee County School Board prior to assigning any new personnel to their key staff positions. Such approval will not be unreasonably withheld. Okeechobee County School Board may, with prior written substantiation, require removal of any employee(s) of the successful Proposer who Okeechobee County School Board reasonably deems incompetent, careless, insubordinate, unsuitable, or otherwise unacceptable, or whose continued employment on the contract it deems contrary to public interest or not in the best interest of Okeechobee County School Board.
  11. News releases pertaining to this procurement or contract shall not be made without prior written approval from Okeechobee County School Board.
  12. Okeechobee County School Board reserves the right to proceed to interview without further discussion of submissions received.
  13. As a condition of the award, the successful Proposer shall, at its expense, ensure that all of the firm's employees who will be permitted access on School grounds when students are present meet the background screening requirements of Sections 1012.465, 1012.467 and 1012.468 Florida Statutes, (Jessica Lunsford Act). Contractor's failure to comply with this requirement will constitute a material breach of the contract. Information regarding the compliance procedure is available by calling the Human Resources Office of the Okeechobee County School Board at (863) 462-5000, extension 1021. All costs to comply with this requirement will be borne by the contractor.
  14. Respondents to this solicitation or persons acting on their behalf may not contact, between the release of the solicitation and the end of the 72-hour period following Okeechobee County School Board posting the notice of intended award, excluding Saturdays, Sundays, and state holidays, any employee or officer of Okeechobee County School Board concerning any aspect of this solicitation, except in writing to the authorized Okeechobee County School Board representative identified in Section 3(b). Violation of this provision may be grounds for rejecting a response.
  15. Subsequent to the execution of an Agreement, no reports, information or data given to or prepared by the successful Proposer shall be made available to any individual or organization by the successful Proposer without the prior written approval of Director of Human Resources.
  16. Any contract resulting from this RFQ shall be governed by the laws of Florida, without giving effect to the choice of laws principles thereof, and is deemed to have been executed, entered into, and performed within Florida. The parties hereby irrevocably submit to jurisdiction in Florida, and venue shall lie in the Okeechobee County Courts. The parties hereby waive any objection to such jurisdiction and venue.
  17. If attempts for contract negotiations fail with the selected firm, then negotiations will begin with the next highest ranked firm until a successful contract is awarded.
  18. As a condition of the award, the successful Proposer affirmatively states that it is registered with and uses the E-Verify system, as defined in F.S. 448.095, to verify the work authorization status of all newly hired employees, contractor, and subcontractors.
  19. When considering final contract negotiations, the master agreement will include applicable provisions regarding public access to all records concerning this Contract according to applicable Florida laws including Chapter 119, Florida Statutes.

#### **E . Insurance Requirements**

Vendors shall furnish a Certificate of Insurance that complies with the insurance requirements listed below. The Certificate of Insurance shall list the deductible to include any self-insured retention (SIR) as well as the type of policy purchased (i.e., claims made or per occurrence) for each of the policies listed below. The following liability coverage limits must not be less than the limits

specified. A thirty (30) day advance notice of cancellation is required. The policies must be specifically endorsed to grant Okeechobee County School Board the same notification rights that it provides to the first named insured as respects cancellation and non-renewal. This endorsement must be attached to the certificate of insurance. Okeechobee County School Board by and through its Risk Management Department and, in cooperation with the Purchasing Department, reserves the right to review, modify, reject, or accept any required policies of insurance, including limits, coverages or endorsements, herein from time to time throughout the term of this contract.

Only insurance companies authorized to do business in the State of Florida with a Best Rating of "B+" or better according to the latest edition of Best's Key Rating Guide, published A.M. Best Company shall be acceptable.

1. General Liability

COMMERCIAL GENERAL LIABILITY INSURANCE, INCLUDING CONTRACTUAL LIABILITY, TO COVER THE HOLD HARMLESS AGREEMENT SET FORTH HEREIN, WITH LIMITS OF NOT LESS THAN:

EACH OCCURRENCE	\$1,000,000
PERSONAL/ADVERTISING INJURY	\$1,000,000
PRODUCTS/COMPLETED OPERATIONS AGGREGATE	\$2,000,000
GENERAL AGGREGATE	\$2,000,000
FIRE DAMAGE	\$100,000 ANY 1 FIRE
MEDICAL EXPENSE	\$5,000-\$10,000 ANY 1 PERSON

AN ADDITIONAL INSURED ENDORSEMENT MUST BE ATTACHED TO THE CERTIFICATE OF INSURANCE. COVERAGE IS TO BE WRITTEN ON AN OCCURRENCE FORM BASIS. THIS INSURANCE SHALL APPLY AS PRIMARY INSURANCE/NON-CONTRIBUTORY WITH RESPECT TO ANY OTHER INSURANCE OR SELF-INSURANCE PROGRAMS AVAILABLE TO OKEECHOBEE COUNTY SCHOOL BOARD. A PER PROJECT AGGREGATE LIMIT ENDORSEMENT SHOULD BE ATTACHED. DEFENSE COSTS ARE TO BE IN ADDITION TO THE LIMIT OF LIABILITY. A WAIVER OF SUBROGATION IS TO BE PROVIDED IN FAVOR OF OKEECHOBEE COUNTY SCHOOL BOARD. XCU COVERAGE IS TO BE INCLUDED WHEN INDICATED BY THE SCOPE OF SERVICE. COVERAGE SHOULD EXTEND TO INDEPENDENT CONTRACTORS AND FELLOW EMPLOYEES. COVERAGE IS TO INCLUDE A CROSS LIABILITY OR SEVERABILITY OF INTERESTS PROVISION AS PROVIDED UNDER THE STANDARD ISO FORM SEPARATION OF INSURED'S CLAUSE.

2. Automobile Liability

BUSINESS AUTOMOBILE LIABILITY FOR ANY AUTO (ALL OWNED, HIRED, AND NON-OWNED AUTOS) WITH LIMITS OF NOT LESS THAN \$1,000,000 PER ACCIDENT. IN THE EVENT VENDOR DOES NOT OWN ANY AUTOMOBILES, OKEECHOBEE COUNTY SCHOOL BOARD WILL ACCEPT PROOF OF HIRED AND NON-OWNED AUTO LIABILITY ONLY. CERTIFICATE HOLDER MUST BE LISTED AS ADDITIONAL INSURED. A WAIVER OF SUBROGATION MUST BE PROVIDED. COVERAGE SHOULD APPLY ON A PRIMARY BASIS.

3. Workers' Compensation

WORKERS' COMPENSATION INSURANCE WITH LIMITS EQUAL TO FLORIDA STATUTORY REQUIREMENTS. EMPLOYERS LIABILITY MUST INCLUDE LIMITS OF AT LEAST \$500,000 EACH ACCIDENT, \$500,000 EACH DISEASE/EMPLOYEE, \$500,000 EACH DISEASE/MAXIMUM. A WAIVER OF SUBROGATION MUST BE PROVIDED. COVERAGE SHOULD APPLY ON A PRIMARY BASIS. SHOULD SCOPE OF WORK PERFORMED BY VENDOR QUALIFY ITS EMPLOYEE FOR BENEFITS UNDER FEDERAL WORKERS' COMPENSATION STATUTE (EXAMPLE, U.S. LONGSHORE & HARBOR WORKERS ACT OR MERCHANT MARINE ACT), PROOF OF APPROPRIATE FEDERAL ACT COVERAGE MUST BE PROVIDED.

WORKERS' COMPENSATION EXEMPTION FORMS WILL NOT BE ACCEPTED FOR THE PROJECT ARCHITECT, ENGINEER, GENERAL CONTRACTOR, OR SOLE PRACTITIONER THAT INTENDS TO SUB-CONTRACT THE WORK TO OTHER INDIVIDUALS OR COMPANIES. THESE ENTITIES OR INDIVIDUALS ARE REQUIRED TO PURCHASE A WORKERS' COMPENSATION INSURANCE POLICY.

If Worker's Compensation Insurance or Form DWC-250 Notice of Election to be Exempt is not provided, vendor must indicate the reason, by signature, from the following:

- 1) Vendor is an Independent Contractor.



Signature \_\_\_\_\_

2) Vendor is an employer in the non-construction industry, who employs less than four part-time or full-time employees.

Signature \_\_\_\_\_

4. Professional Liability

WHEN INDICATED BY THE SCOPE OF SERVICE, VENDOR MUST MAINTAIN PROFESSIONAL LIABILITY OR EQUIVALENT ERRORS & OMISSIONS LIABILITY WITH LIMIT OF NOT LESS THAN \$1,000,000 PER OCCURRENCE. FOR POLICIES WRITTEN ON A CLAIMS MADE BASIS, VENDOR SHALL MAINTAIN A RETROACTIVE DATE PRIOR TO OR EQUAL TO THE EFFECTIVE DATE OF THIS CONTRACT. IN THE EVENT THE POLICY IS CANCELED, NON-RENEWED, SWITCHED TO AN OCCURRENCE FORM OR THERE IS A CHANGE IN RETROACTIVE DATE, VENDOR MUST PURCHASE AN EXTENDED REPORTING PERIOD RIDER DURING THE LIFE OF THIS CONTRACT OF NOT LESS THAN 3 YEARS. COVERAGE IS TO APPLY ON A PRIMARY BASIS.

5. Umbrella/Excess Coverage

UMBRELLA/EXCESS LIABILITY INSURANCE THAT PROVIDES COVERAGE FOR ALL UNDERLYING POLICIES WITH LIMITS OF NOT LESS THAN \$1,000,000.

**F .** Evaluation Criteria

The Selection Committee will evaluate the written proposals to determine the firm best suited to fulfill the District's requirements.

Okeechobee County School Board reserves the right to accept or reject any proposal in the best interest of the School District.

Okeechobee County School Board reserves the right to award the contract to the next most qualified firm if the successful firm does not begin the contractual services within fifteen (15) days of signing the contract.

The following Criteria are intended to provide the Selection Committee with information regarding the qualifications of each proposing scanning services firm. The submittal shall be organized, tabbed, and shall respond to each of the Criteria in the same order listed below.

**Written Proposal Format and Evaluation Criteria**

1. **TAB 1: LENGTH OF TIME IN BUSINESS & QUALIFICATIONS OF ASSIGNED STAFF** (0-5 Points)  
Rank the firm based on the number of years in business and the experience/resumes of the staff members assigned to this project.
2. **TAB 2: MINORITY BUSINESS ENTERPRISE, WOMEN OR VETERAN OWNED** (0-5 Points)  
Rank the firm based on their Certification as a Minority Business Enterprise, Women or Veteran Owned business.
3. **TAB 3: PROPOSED COMPLETION TIMELINE FOR DIGITIZING EXISTING DOCUMENTS** (0-20 Points)  
Rank the firm based on the steps and timeframe involved for their proposed completion of digitizing existing documents.
4. **TAB 4: INSURANCE, LITIGATION, & SETTLEMENTS** (0-5 Points)  
Rank the firm based proof of insurance and applicable coverage for this project. In addition, disclose any pending litigation and any settlements in the past five (5) years.
5. **TAB 5: DISASTER RECOVERY PLAN & DATA SECURITY** (0-20 Points)  
Rank the firm based on their disaster recovery services and data security documentation.
6. **TAB 6: SUPPORT & TRAINING DURING TRANSITION PROCESS** (0-15 Points)  
Rank the firm based on their support during the transition process and the steps in place to ensure data accuracy.
7. **TAB 7: REFERENCES** (0-15 Points)  
Rank the firm based on their references from at least three other school districts, preferably districts in Florida.
8. **TAB 8: FEE SCHEDULE** (0-15 Points)  
Rank the firm based on their fee schedule.

**Written Proposal Total Possible Points = 100 Points**

**SECTION 4 - SELECTION PROCESS**

The written Proposals received in response to this RFQ will be evaluated and ranked by a Selection Committee, comprised of no fewer than three (3) voting members in accordance with the process and evaluation criteria and utilizing the attached Ranking Sheet. Various Professional Consultants, representatives from Okeechobee County School Board may also be present during this process as non-voting members of the Committee. A ranking shall be established by totaling the sum of the scores given to each Proposer by all voting members of the Selection Committee.

No information will be released by Okeechobee County School Board after the due date for submission of the Proposals until the selection has been made. All submitting firms will receive notification of the selected Proposer. The Okeechobee County School Board reserves the right to conduct or not conduct interviews, at its sole discretion.

Evaluation Criteria Rating Sheets

The Selection Committee will evaluate the Proposals received in response to this RFQ based on the Evaluation Criteria included in this document. The Selection Committee will utilize the attached Evaluation Rating Sheets during the scoring process.

Recommendation

The Selection Committee will recommend to the Okeechobee County School Board that an Agreement for services be negotiated with the firm with the highest total points for the provision of digital records management services.



## Digital Records Management Solution Request for Qualifications

Reference Form for School Districts

School District: \_\_\_\_\_

District Contact: \_\_\_\_\_

Contact Telephone: \_\_\_\_\_

Contact Email: \_\_\_\_\_

*Using a scale of 1-5 (where '1' is poor and '5' is outstanding), please rate the digital records management firm you retain for each of the areas.*

Area	Rating	Comments
Timeliness in Completing Existing Personnel File Conversion		
Overall Level of Support Provided During Transition Process		
Responsiveness in Addressing District Concerns		
Support Provided in Converting Physical Forms to Digital Formats		
'Glitches' present in the digital records management solution.		
Training Services		
Overall System Ease of Use		

The Okeechobee County School Board  
 Digital Records Management Solution Request for Qualifications Evaluation Form

Date: \_\_\_\_\_

	Tab 1: Length of Time in Business & Qualifications of Assigned Staff	Tab 2: Minority Business Enterprise, Women Or Veteran Owned	Tab 3: Proposed Completion Timeline for Digitizing Existing Documents	Tab 4: Insurance, Litigation, Settlements	Tab 5: Disaster Recovery Plan & Data Security	Tab 6: Support & Training During Transition Process	Tab 7: References	Tab 8: Fee Schedule	Total	Rank
Name of Firm	5 Points	5 Points	20 Points	5 Points	20 Points	15 Points	15 Points	15 Points		

Selection Committee Signatures:


Comments:


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