VILLAGE OF CARY

655 Village Hall Drive
Cary, IL 60013

Document Imaging Request for Proposals

Issued: February 22, 2021

Addendum #1 – Document Imaging Request for Proposals
Friday, March 12, 2021 10:00 AM (CDT)

Proposal Due Date: March 22, 2021

The following addendum has been issued by the Village of Cary to clarify information related to the original Document Imaging Request for Proposals issued on February 22, 2021. The addendum is in response to questions raised by prospective bidders via email to the Village. All other terms and conditions of the original RFP shall remain unless otherwise clarified below.

The following questions were submitted to the Village of Cary in response to the Request for Proposals:

1. **Will all addresses be listed as Building Number and Street Name Only? Will we have to capture the City and Zip Code as well? Will we have to capture and Apartment or Suite Number?**

   Answer - Only the building number and street name will need to be captured for each document. Apartment and/or suite numbers will not need to be captured. The Village can provide a master list of service addresses within the Village.

2. **Do you have an existing spreadsheet of any of the requested index fields such as Addresses, Permit Numbers or Zoning Case Number? Existing spreadsheets are super helpful.**

   Answer - The Village can provide a master list of service address within the community. Provided below is a sample of the address listing. Due to age of documents, an electronic database of permit or zoning case numbers is not available.

449 HIGH RD	449	HIGH RD
450 HIGH RD	450	HIGH RD
453 HIGH RD	453	HIGH RD
103 HILL ST	103	HILL ST
111 HILL ST	111	HILL ST
117 HILL ST	117	HILL ST
121 HILL ST	121	HILL ST
80 HILLHURST DR	80	HILLHURST DR
83 HILLHURST DR	83	HILLHURST DR
87 HILLHURST DR	87	HILLHURST DR

3. **The RFP asks for a per File Drawer cost. Can you please establish the following so vendors can bid on the same bid criteria:**
   A) **Average # of Address Files per drawer.**
   B) **Average # of pages per Address File.**
   C) **Average # of Permit #'s per Address File.**
   D) **Average # of Drawings per Address File or per drawer.**

   Answer - Due to the varying age of documents stored in each drawer it is difficult to provide averages. As a result, the RFP requested a per drawer cost and recommended vendors review documents in advance of submitting a proposal. For reference the Village has a total of 6,370 unique addresses within the community. Per the RFP drawers ranged between 60 and 120 separate address folders in those that were sampled. In response to the above question, the Village took the following two 2" samples from different drawers:
   i. Sample 1 – 12 Address Folders, 71 Permits, 2 Zoning Cases, 339 Documents, 15 Oversized Pages
   ii. Sample 2 – 1 Address Folder, 1 Permit, 177 Documents, 15 Oversized Pages

The above samples may not be indicative of the mixture of documents in all drawers but is provided for additional reference. Sample 1 was taken from an older portion of the community with property's developed more than 50 years ago. Sample 2 was taken from a recent development within the past 5 years.

4. **In order to estimate quantities as apples to apples for all of the vendors, would the following estimate be accurate?**
   a. **1 file drawers x 27" x 150 small-format pages per inch= 4050 pages**
   b. **4050 x 85 drawers= 344,250 small-format pages total**
   c. **I am unclear as to how many large format pages per drawer to estimate. Would it be possible to take 2-3 drawers and count the large format sheets to use as our estimate per drawer for the rest of the project?**

   Answer – See response to question #3 above for a sample from two drawers. The Village encourages vendors to review the documents in advance of submitting a proposal.

5. **Please confirm that the files will be destroyed and no re-prep will be necessary.**

   Answer – Per Section VIII of the RFP document, the vendor shall provide an estimate for costs to destroy the records. Records shall not be destroyed until the electronic version of the record has been delivered to the Village and approved. No re-prep of files will be necessary.

6. **Will the Village of Cary have the Building Permit files boxed or would you like the vendor to box the files during pick-up?**

   Answer - The Village anticipated boxing the files for the vendor to pick-up. If this is a service the vendor may also be able to provide, please specify within bid proposals for either scenario.

7. **Can we pick all the Building Permit files up in one pick-up?**

   Answer - The Village would prefer the documents be picked-up in multiple sub-phases versus all at one time. Using multiple phases would reduce requests for documents that are out for scanning and would allow for review of delivery throughout the scanning process. Depending on timeline to complete the project, the Village would be open to as few as three pick-ups for records.

8. **How many Building Permit requests per week on average can the vendor expect while processing the files?**

   Answer - Depending on number of files out for scanning, the Village anticipates requests may range around 10 items per week.

9. **What do you mean by a 'published volume'? Is that something associated with your SharePoint template?**

   Answer - The terminology is not associated with our SharePoint Template. Published volume simply refers to a method in which the records are stored on the medium (i.e. DVD / Hard Drive) in an identifiable way that they can be easily located and transferred into SharePoint directly without manually copying into our file structure.

10. **Can we get a specification of the SharePoint template you are using?**

Answer - The Village is willing to work with the selected Vendor on parameters of our system. Data for records are currently stored in individual document properties within SharePoint. Fields available for data entry include Name, Title, Property Address, Subdivision, PIN Number, Permit Number, Zoning Case Number, Citation Number, and Property Maintenance Number. A label field is also used to identify permanent records. Per the RFP the only fields to be populated are the Property Address and the Permit Number/Zoning Case Number for selected records in addition to the name of the file.   Provided below is a screenshot of the data entry fields available.
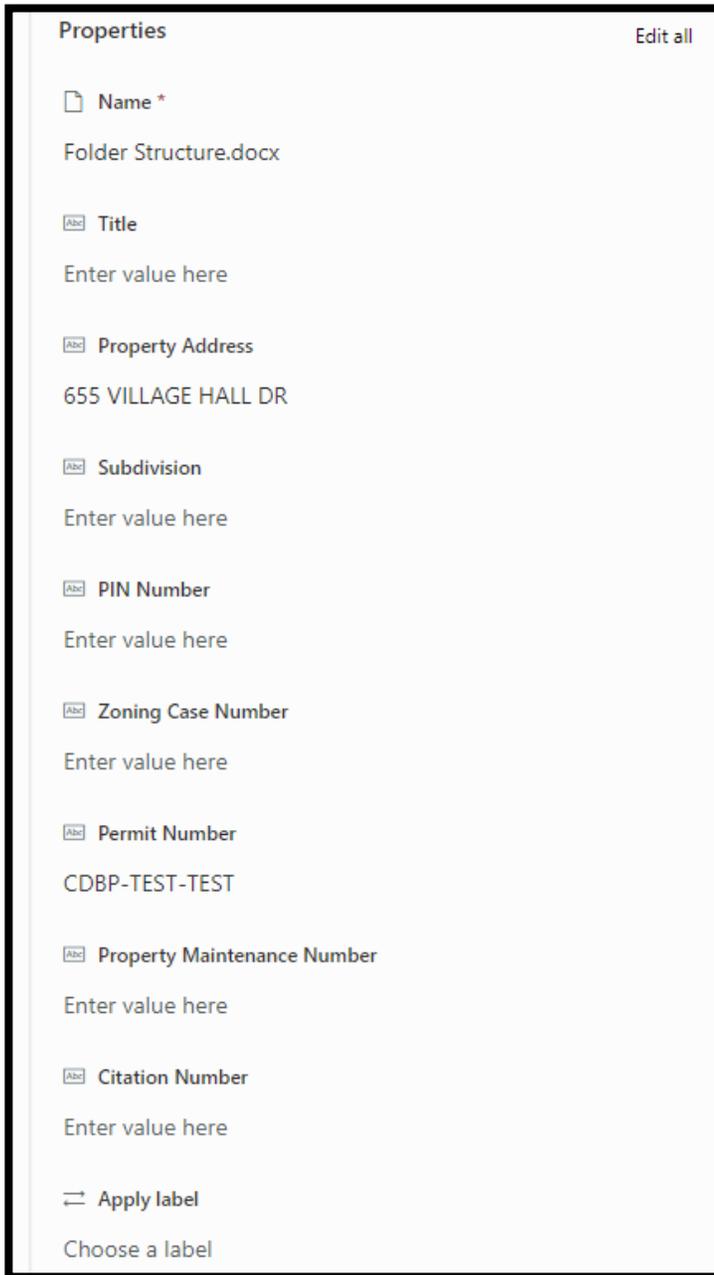
Properties   Edit all

Name *

Folder Structure.docx

Title

Enter value here

Property Address

655 VILLAGE HALL DR

Subdivision

Enter value here

PIN Number

Enter value here

Zoning Case Number

Enter value here

Permit Number

CDBP-TEST-TEST

Property Maintenance Number

Enter value here

Citation Number

Enter value here

⇄ Apply label

Choose a label

11. **Are you expecting the "attachment process" to be automated so that folder and files from the 'published volume' are automatically moved? Why can't they just be copied?**

    Answer - The Village is seeking to have the data inputted into our system with minimal staff involvement. Preference is for this process to be automated due to the number of address folders and permit records which would be created as a result of the scanning project. Vendor will be required to provide a means for transferring the data into our database. The Village would also be open to exploring providing the Vendor access to the Village's Property Archive storage area in our SharePoint database to allow the Vendor to direct load scanned documents into the system.

12. **Attachment A – Bid sheet looks like you are expecting a price for each file drawer. But this needs to be priced per image or folder. Can we alter the bidding table to match what we'd like to bid?**

    Answer - Bidders shall provide a detailed breakdown of the proposed bid amount which shall at a minimum include a price breakdown as specified per Attachment A. Additional information beyond the minimum required cost breakdown can be provided. Due to the amount of records to be scanned, the Village is encouraging potential bidders physically review the records to assist with formulating their proposals. See response to question #3 for two samples taken from file drawers.

13. **Do we need to apply any naming convention to files?**

    Answer - Per Section IV of the RFP, documents shall be named in the following formats:
        i. Building Permits:
           CDBP-YEAR-PERMIT NUMBER
           (i.e. "CDBP-1995-1234")
        ii. Zoning Files:
           CDPZ-CASE NUMBER
           (i.e. "CDPZ-95-ZPA-01-002")

14. **Would you consider an email transmission of our RFI response (versus hard copy)?**

    Answer - Per Section IX of the RFP, emailed or faxed proposals will not be accepted.

15. **What is the level of preparation required? (Removal of fasteners, staples, post-it's, etc.)**

    Answer - Permit records are generally bound by staples or paper clips which would need to be removed. Some files may require organization of loose documents in addition to bound records.

16. **What level of reassembly is required? (Do we need to apply to fasteners, post-it's and rearrange the documents in the same order after scanning?)**

    Answer - No reassembly is required after digitization. Records to be destroyed upon approval by Village.

17. **Is this a new requirement? If not, can you please provide the name of the incumbent, the current contract value and eligibility criteria to re-compete?**

    Answer - This is a new project. The Village has not previously contracted these services.

18. **Can we pick all the documents within single visit? If no, how many documents Village will provide in each visit?**

    Answer - The Village would prefer the documents be picked-up in multiple sub-phases versus all at one time. Using multiple phases would reduce requests for documents that are out for scanning and would allow for review of delivery throughout the scanning process. Depending on timeline to complete the project, the Village would be open to as few as three pick-ups for records.

19. **How many documents will be there in one drawer?**

    Answer – See response to question #3 above.

20. **Are all documents prepared and ready for pick up at one time or will multiple trips need to be made?**

    Answer - The Village anticipated boxing the files for the vendor to pick-up. If this is a service the vendor may also be able to provide, please specify within bid proposals for either scenario. The Village would prefer documents be picked-up in multiple sub-phases and would be open to as few as three pick-ups for records.

21. **Do we need to provide the digitized documents in specific folder structure?**

    Answer - See RFP Section IV Format and Technical Requirements for requested folder structure.

22. **What information should vendor need to index from the documents?**

    Answer - See RFP Section IV Format and Technical Requirements for requested indexes.

23. **Are the documents to be scanned one sided or two sided? If two sided then what % of total document?**

    Answer - Files include a mixture of single and two-sided documents. A percentage has not been determined but the majority of records are single-sided.

24. **Do we need to scan document as Black & white or greyscale or color? If color then what % documents are expected as color?**

    Answer - Documents can be scanned in greyscale. Color is not required.

25. **What is the size and quantity of the files that needs to be scanned? Please provide approximate quantity next to the below given sizes:**
    1.   **8.5"x11" up to 11"x17":**
    2.   **11"x17" up to 18"x24":**
    3.   **18"x24" up to 24"x36":**
    4.   **24"x36" up to 36"x48":**
    5.   **36"x48" and above:**

    Answer – In Sample 1 taken above for question #3 the mixture of document sizes included 8"x11" or smaller 52.3%, 8"x17" 35%, 11"x17" 7.5%, and greater than 11"x17" at 4.5%. For Sample 2 the mixture of documents sizes included 8"x11" 92.2% and greater than 11"x17" at 7.8%. This information is provided for reference. The Village does not certify that these percentages are consistent throughout the entire project.

26. **Are you using any document management software? If yes, what is the name of that software?**

    Answer – As stated in the RFP, the Village is utilizing SharePoint as the Village's document management software.

27. **Do you want to make the files text searchable (OCR)?**

    Answer – OCR is not required. Files do not need to be text searchable.

28. **The images can be scanned in B&W or grayscale as needed. But we just wanted clarification should we come across a blueprint, for example, which may be color-coded in some way (example: blue lines where there is wiring; red lines where a fire alarm system may be). Would a document such as this still be OK to do grayscale, or would you want us to switch to color scanning?**

    Answer – Blueprints or similar documents may be scanned in grayscale formatting. Color is not required.

29. **As the RFP states, the large format drawings within a particular file can be grouped together and scanned at the end of that folder. Would you want multiple large format drawings within each file to be grouped into one single PDF, or have each large format drawing constitute an individual PDF? (We would recommend creating an individual PDF for each drawing, as a group of multiple drawings can create quite a large and unwieldy document.)**

    Answer – Preference is for all documents, including regular and large format drawings, to be grouped together into one single PDF for each permit/zoning case. The Village may be open to separating out standard and oversized documents into separate documents if the size of a particular file warrants the need for multiple documents. However, this should be more of an exception than the norm.

30. **Regarding the integration of the scanned documents into Sharepoint, what level of access will the vendor be allowed? The vendor would only need to access the permit folders in Sharepoint, so we're concerned about the privacy of other types of residents' information which may be accessible. Does the Village of Cary have a Sharepoint developer on staff who can assist in facilitating this process?**

    Answer – The Village is open to providing the Vendor with direct access to the Property Archive folder to direct load documents into the Village's SharePoint system upon scanning. Vendor would only be provided access to the folder where documents are to be stored and would not have access to other information on the Village's site. The Village contracts with a third-party to assist with our SharePoint structure that would be able to assist with facilitating access to the system.