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# **Viewing HRS files prior to November 15, 2001**

Site visits are allowed for vendors to view sample HRS files and the current filing system. These files will not leave the premises and will be viewed with a Richland One employee present. Please call to make an appointment with Human Resources at 803-733-6063 during the week of November 5<sup>th</sup> between the hours of 1:30 and 4:30 for a 30-minute session.

## **Change to General Conditions**

### **NUMBER OF PROPOSALS TO BE SUBMITTED**

Each OFFEROR must submit the requested number of copies (seven) of the proposal. The OFFEROR must mark on the envelope or wrapping containing the proposal the RFP identification number specified in the RFP.

## **Add to General Conditions # 19**

### **CONTRACT VIOLATION**

Examples of vendor violations include, but are not limited to:

- Vendor adding items to the contract without approval
- Vendor increasing contract price without approval
- Misrepresentation of the contract to any using District entity

## **Add to Special Conditions**

### **CONTACT LIMITATION**

By submission of a response to this RFP, vendor agrees that during the period following issuance of the proposal and prior to the statement of intent to award, vendor shall not discuss this procurement with any party except members of Richland School District One or other parties designated in this solicitation. OFFERORS shall not attempt to discuss or attempt to negotiate with the using Department, any aspects of the procurement without the prior approval of the buyer responsible for the procurement.

### **OFFEROR'S DUTY TO INSPECT AND ADVISE**

Each OFFEROR shall fully acquaint himself with the scope of this RFP. The failure of an OFFEROR to acquaint himself with existing pre-contract conditions or post-contract consequences shall in no way relieve such OFFEROR of any obligation with respect to this proposal or to any contract resulting hereof.

OFFERORS must notify the District of all costs reasonably expected. OFFERORS are notified that their failure to inspect, familiarize themselves with, or otherwise gather information as to the total cost to the District, will, in addition to any and all other remedies available, create cost difference liabilities and claims against the ultimately successful OFFEROR.

### **LATENT DEFECTS**

Contractor warrants that upon notification by the District, as set forth in the Procurement Code, of a latent defect in design, material or workmanship, or a latent nonconformity of the services, material, or equipment to the specifications, which would have constituted a basis for rejection if discovered prior to acceptance, it will repair or replace or otherwise correct the defect to the level of performance specified in this RFP.

## **CONTRACTOR SOLELY RESPONSIBLE FOR PERFORMANCE**

The DISTRICT will rely upon the CONTRACTOR for full, complete, and satisfactory performance under the terms and conditions of this agreement.

If the CONTRACTOR'S services provided for hereunder include services, equipment, or materials supplied by a subcontractor, the CONTRACTOR must act as the prime CONTRACTOR for these items and assume full responsibility for performance hereunder. The CONTRACTOR will be considered the sole point of contact with regard to all situations, including payment of all charges and the meeting of all other requirements.

## **SUBCONTRACTORS**

Subcontractors are subject to same terms and conditions of this agreement as the CONTRACTOR.

## **ORDERLY TRANSFER OF MATERIALS**

Upon termination of the contract for any reason, the District shall have the right, upon demand, to obtain access to, and possession of, all District properties, including, but not limited to, current copies of all District application programs and necessary documentation, all files, intermediate materials and supplies held by the contractor.

## **NON INTERFERENCE**

In the event CONTRACTOR is unable for any reason to provide any material, services, supplies, products or other items of any type or variety to the DISTRICT under this agreement, including but not limited to any such materials, services, supplies, etc. available from any other party (such as subcontractors) supplying said materials, services, etc. to CONTRACTOR, the DISTRICT will have the right to deal directly with the other supplier without penalty or interference from CONTRACTOR.

## **OWNERSHIP OF DATA**

All data and other records entered into any database of the District or supplied to the CONTRACTOR by the District are, and shall remain, the sole property of the District. CONTRACTOR shall: not copy or use such records without the District's written consent except to carry out contracted work, not transfer such records to any other party not involved in the performance of this Agreement; and will return submitted records to the District upon completion of the work hereunder.

## **OPTION TO RENEW**

The initial term of this agreement is one (1) year from the effective date as stated on the award document. Unless terminated by either party at the end of the initial term, at the end of successive "contract" terms, or as otherwise allowed within this document (see termination section), the contract will automatically extend at the prices, terms and conditions approved by the Procurement Office. Said extensions may be less than, but will not exceed, four (4) additional, one-year periods.

## **PRICES**

Prices under this contract are "not to exceed" prices. District departments are not authorized to pay more than the stated price. CONTRACTORS may offer, and departments may accept prices below those listed on the contract.

## **PRICE ADJUSTMENT**

Any request for price increase must be submitted to the Procurement Office at least ninety (90) days prior to the requested date for the increase. Price increases will only become effective if agreed to, in writing, by the Procurement Office.

## **Replaces section 2.1**

### **CARD INDEXES:**

The first goal of this project is to have all handwritten Card Indexes for each employee scanned into the system. As this is the only copy of employee job history for the District, it is imperative for Disaster Recovery purposes that this information be imaged and a copy of the information stored off-site.

### **APPLICANT FILES**

The second goal is to provide document management and district-wide access to applicant information. The active applicant files would be scanned into one folder (applicant), subfolders/sections and indexed by the following: 1) Applicant type (classified, certified, substitute, vacancy, resume), 2) name (possibly separate last name and first name), 3) Social Security Number, 4) Date of Application, 5) position (s) applied for, 6) vacancy number, 7) certification area 8) document type. (for example: correspondence, transcripts, reference forms, interview forms, exams and miscellaneous).

### **EMPLOYEE FILES:**

The next goal is to provide document management for items contained in an employee folder as outlined in section 1.4.1. The active employee files would be scanned into one folder (employee), subfolders/sections and indexed by the following: 1) Applicant type (classified, certified, substitute, vacancy, resume), 2) name (possibly separate last name and first name), 3) Social Security Number, 4) Date of Application, 5) position (s), 6) vacancy number, 7) certification area and 8) document type. Although inactive files will not be scanned, the associated card index for that individual will be scanned into the system.

As employees retire, Human Resources will need to archive the employee file after they have been inactive for five years. The card index of the employee should remain on-line, and the remainder of the employee file should be archived to near-line and off-line (microfilm) storage.

### **LEGAL SERVICES FILES:**

Additionally, we would scan all legal documents required by our Legal Services department. Each folder has several types of documents and ranges from ten pages to hundreds of pages. They would need to be indexed by Location code, Department Name, Employee or Student Name, Assigned Number, Case Number, and Party that brings the action.

### **WEB BASED ACCESS**

Furthermore, we would provide access to employee information district wide to principals, directors, department heads and administrators to appropriate documents and document types via a web browser (or web enabled application). Once phase one is complete and successful in Legal Services and Human Resource Services, we anticipate using this system district-wide. Two areas already targeted to implement the system after phase one is complete, in addition to expanded Human Resource capabilities, are Richland One's Paperwork Taskforce and Student Records in Student Support Services. Any features, modules or services these areas need, in addition to the needs of the Human Resources and Legal Services implementation should be listed separately, as well as any additional costs.

### **ARCHIVING**

Finally, we would like to archive information, based on certain criteria to a searchable CD-ROM, DVD for near-line access or to microfilm for permanent storage as recommended by the State Archives Department of South Carolina. Criteria example: archive all employees with an inactive date greater than 5 years. However, we intend to keep a copy of the inactive employee's card index on-line.

## **Add section 2.1.1 Proposed Phase 2**

### **ON-LINE FORMS**

In order to expedite the processing of applicants, as well as employee job changes, Human Resource Services needs to have the following forms available to schools/departments using Richland One's Intranet:

- Applicant Entry Forms: Basic applicant entry information – including job history, education and references; demographic (EEOC) information;
- Personnel Transaction Forms: position, account (budget code), incumbent information, effective date of change, date of hire or termination, and authorized signatures; This form is completed by the hiring manager for processing all employee job changes, signed, sent to Budget Services for position control verification, and sent to Human Resources to be processed and filed in the employee folder.

Eventually, the applicant form will need to be accessible via Richland One's Internet.

### **DATA CAPTURE:**

Information from Teaching Certificates needs to be retrieved from the form for automated data entry into MUNIS or a Human Resource Management system. In Phase One, we require a text file of the extracted information from the form.

### **ADDITIONAL FILES FOR CONVERSION**

Upon completion of phase one, we will want to scan employee evaluations, benefits information and professional development information.

## **Add to section 2.9.1**

1. When performing double sided scanning, can the system support the automatic discarding of blank sides of images that are scanned for all documents in which the second side is blank?
2. Can a list of standard documents (or document types) needed in an employee file be created, and the system provide an error listing if the document (or document type) is not in the file (or provide an exception report)?
3. Describe the document check in/check out procedure.
4. If the proposed system is "bar-code" capable, describe the most cost-effective and efficient way for Richland One to obtain updated bar code labels for employees, as new employees are added every day.

## **Add to section 2.9.2**

1. Describe what “prepping” a document entails.
2. Provide a detailed description of the methodology to be used during the conversion process. Include an estimated timeframe to complete.
3. Provide a detailed description of the methodology to be used to verify the conversion of the documents.

## **Delete Question # 1 in section 2.9.4**

## **Add to section 2.9.4**

1. Does the system integrate with GroupWise, the District’s current electronic mail system, for emailing or routing of documents?
2. Please state which systems you integrate with:
  - a. Financial
  - b. Time and Billing Management
3. How would the system assist with data entry into MUNIS for Teaching Certificates?
  - a. Provide a text file
  - b. Provide an automated process

## **Add to Section 3.0 Written Proposals**

Proposals will include all data and information required by this RFP. The proposal for the Richland One system should be clear, coherent, legible, and prepared in sufficient detail for effective evaluation. Elaborate documents, expensive binding, detailed artwork or other embellishments are neither necessary, nor desirable. The vendor will assume that the evaluation team has no previous knowledge of this technology and will base its evaluation on the information presented in the proposal.

Vendors are encouraged to answer all questions without reference to manuals, data sheets, product brochures, or other supporting material. When warranted, vendors may support answers by reference to other material included as appendices; however, answers such as “See Appendix A, Technical Manual,” will be marked as non-responsive. Any supporting material cited in an answer must be referenced by appendix, name of document and page(s) to be reviewed.

Content and quality are more important than quantity; however, phrases such as “yes,” “will comply,” “standard procedures will be employed,” “Industry standards are followed,” or, “well-known techniques will be used,” should be used cautiously. We may not know what you mean.

The vendor should also submit other items of hardware, software, and/or training that are available and are logical upgrades or enhancements to the equipment and software proposed. The vendor must specifically identify these items separately and not as a part of the original price. The request for this option is simply for ease of future add-on purchases not included in Phase I of this project. The vendor must list the unit price for each piece of equipment and its associated installation and maintenance and preventative maintenance charges.

Include copies of annual maintenance agreements, service agreements, and preventative maintenance agreements for hardware and software detailing what these services include.

# Replaces section 3.4

## Cost Proposal Sheet for Phase 1

<b>PHASE 1 COST PROPOSAL PRICE SHEET</b> - Costs should include all software, hardware, services and “other” categories needed to fully implement the HRS and Legal Services requirements as stated in section 1.7 and Goals stated in the revised section 2.1. Software, hardware, services and “other” categories needed to implement goals as stated in sections 2.1.2, 2.2, 2.2.1, 2.2.2, 2.2.3, 2.2.4, 2.2.5, and 2.2.6 of the RFP should not be included on this price sheet, but listed separately so that Richland One may budget for these features and add on to this system within the five year period.			
<b>See minimum/recommended requirements in section 3.4.1</b>	<b>Product Description</b>	<b>Product Number</b>	<b>Cost (fixed cost, unless stated otherwise)</b>
<b>Hardware</b>			
Server			
Storage Medium			
Desktop Scanner (3)			
High-End Scanner (1)			
Cables, network cards, SCSI adapters, etc. needed for above equipment			
Other hardware:			
<b>Software (include # of licenses; # of concurrent users; cost to expand # of users, and cost of future upgrades/releases)</b>			
Scan station software			
Application Browser software			
Web Enabled Browser software			
Enhanced (user-created) reporting capabilities			

**PHASE 1 COST PROPOSAL PRICE SHEET** - Costs should include all software, hardware, services and “other” categories needed to fully implement the HRS and Legal Services requirements as stated in section 1.7 and Goals stated in the revised section 2.1. Software, hardware, services and “other” categories needed to implement goals as stated in sections 2.1.2, 2.2, 2.2.1, 2.2.2, 2.2.3, 2.2.4, 2.2.5, and 2.2.6 of the RFP should not be included on this price sheet, but listed separately so that Richland One may budget for these features and add on to this system within the five year period.

<b>See minimum/recommended requirements in section 3.4.1</b>	<b>Product Description</b>	<b>Product Number</b>	<b>Cost (fixed cost, unless stated otherwise)</b>
Other software or capabilities:			
<b>Services</b>			
Implementation (project management, delivery, training, and installation)			
Workflow (quote hourly rate)			
Prepping (quote hourly rate)			
Scanning (quote fixed based on # of pages and hourly for anything after that)			
Indexing (quote fixed based on indexing needs provided by Richland One for the # of documents specified and hourly for anything after that)			
Training after implementation (quote daily rate and include travel, expenses and per diem)			
Other services:			

**PHASE 1 COST PROPOSAL PRICE SHEET** - Costs should include all software, hardware, services and “other” categories needed to fully implement the HRS and Legal Services requirements as stated in section 1.7 and Goals stated in the revised section 2.1. Software, hardware, services and “other” categories needed to implement goals as stated in sections 2.1.2, 2.2, 2.2.1, 2.2.2, 2.2.3, 2.2.4, 2.2.5, and 2.2.6 of the RFP should not be included on this price sheet, but listed separately so that Richland One may budget for these features and add on to this system within the five year period.

<b>See minimum/recommended requirements in section 3.4.1</b>	<b>Product Description</b>	<b>Product Number</b>	<b>Cost (fixed cost, unless stated otherwise)</b>
<b>Other</b>			
Archival Process (include equipment and software needed)			
Software maintenance and support (include first year and then list annual cost)			First Year: Annual:
Hardware maintenance and support (include first year cost and then list annual cost)			First Year: Annual:
Preventative Maintenance on Hardware (include first year cost and then list annual cost)			First Year: Annual:

**Additional Phases Cost Proposal Sheet**

**ADDITIONAL PHASES COST PROPOSAL PRICE SHEET** - Costs should include all software, hardware, services and “other” categories needed to fully implement goals as stated in section 2.1.1, 2.2, 2.2.1, 2.2.2, 2.2.3, 2.2.4, 2.2.5, and 2.2.6 of the RFP, so that Richland One may budget for these features and add on to this system within the five year period. Please list the section number where applicable due to various departmental budget needs. Software, hardware, services and “other” categories needed to implement phase 1 of the RFP should not be included on this price sheet, but listed on the Phase 1 Cost Proposal Price Sheet.

<b>See minimum / recommended requirements in section 3.4.1</b>	State section # if specific to the needed functionality	Product Description	Product Number	Cost (fixed cost, unless otherwise stated)
<b>Hardware</b>				
Server				
Storage Medium				
Desktop Scanner (1) The District will use the unit price when purchasing additional scanners				
High-End Scanner (1) The District will use the unit price when purchasing additional scanners.				
Cables, network cards, SCSI adapters, etc. needed for above equipment				
Other hardware:				

**ADDITIONAL PHASES COST PROPOSAL PRICE SHEET** - Costs should include all software, hardware, services and “other” categories needed to fully implement goals as stated in section 2.1.1, 2.2, 2.2.1, 2.2.2, 2.2.3, 2.2.4, 2.2.5, and 2.2.6 of the RFP, so that Richland One may budget for these features and add on to this system within the five year period. Please list the section number where applicable due to various departmental budget needs. Software, hardware, services and “other” categories needed to implement phase 1 of the RFP should not be included on this price sheet, but listed on the Phase 1 Cost Proposal Price Sheet.

<b>See minimum / recommended requirements in section 3.4.1</b>	State section # if specific to the needed functionality	Product Description	Product Number	Cost (fixed cost, unless otherwise stated)
<b>Software (include # of licenses; # of concurrent users; cost to expand # of users, and cost of future upgrades/releases)</b>				
<b>Services</b>				
Implementation (project management, delivery, training, and installation)				
Workflow (quote hourly rate)				
Prepping (quote hourly rate)				
Scanning (quote hourly rate)				
Indexing (quote hourly rate)				

**ADDITIONAL PHASES COST PROPOSAL PRICE SHEET** - Costs should include all software, hardware, services and “other” categories needed to fully implement goals as stated in section 2.1.1, 2.2, 2.2.1, 2.2.2, 2.2.3, 2.2.4, 2.2.5, and 2.2.6 of the RFP, so that Richland One may budget for these features and add on to this system within the five year period. Please list the section number where applicable due to various departmental budget needs. Software, hardware, services and “other” categories needed to implement phase 1 of the RFP should not be included on this price sheet, but listed on the Phase 1 Cost Proposal Price Sheet.

<b>See minimum / recommended requirements in section 3.4.1</b>	State section # if specific to the needed functionality	Product Description	Product Number	Cost (fixed cost, unless otherwise stated)
Application Interface / Integration (quote hourly rate)				
Training after implementation (quote daily rate and include travel, expenses and per diem)				
Other services:				
<b>Other</b>				
Software maintenance and support (include first year and then list annual cost)				First Year: Annual:
Hardware maintenance and support (include first year cost and then list annual cost)				First Year: Annual:
Preventative Maintenance on Hardware (include first year cost and then list annual cost)				First Year: Annual:

### **Add section 3.4.1**

Please take the following requirements into consideration when completing the cost proposal

#### **Recommended Minimum Hardware Requirements**

1. Dual Pentium III or IV processor 800 Mhz or greater
2. 1 GB RAM
3. SCSI Hard drive (s)
4. Windows NT Server 4. sp6a or Windows 2000 sp1
5. UPS
6. Backup tape drive w/ software
7. 1.44 MB 3.5 diskette drive
8. CD-ROM drive
9. SVGA adapter and monitor
10. Enhanced 101-key keyboard
11. MS-compatible mouse

#### **Minimum Desktop scanner requirements:**

1. 75-100 ppm
2. Duplex
3. Automatic and single document feed
4. Automatic document feeder with capacity of 150 pages
5. Document thickness from onionskin to card stock
6. Paper size up to 8.5 x 14
7. 300 dpi

#### **Minimum High-End scanner requirements:**

1. 100-250 ppm
2. Duplex
3. Bar code capable
4. Support up to 3 bar codes on forms or a bar code with 3 index values
5. Automatic and single document feed
6. Automatic document feeder with capacity of 300-500 pages
7. Document thickness from onionskin to card stock
8. Paper size up to 11 x 17
9. Grayscale and Black and White images
10. 400 dpi
11. Document feed for different paper sizes
12. Preset image processing templates
13. Automatic skew correction
14. Document counting

## Storage Requirements

Considering the following:

1. Human Resources storage requirements
  - a. Card Indexes
    - i. Need all card indexes on-line; always
    - ii. 7,300 total records - active total 4,500; inactive total 2,800
    - iii. This information will eventually move to an HR Management system
  - b. Applicant Files
    - i. Retention schedule is two year; Keep on-line for one year; Therefore, will have current and past year on-line
    - ii. Average year contains 5,000 records (applicants); an average file contains 25 sheets;
    - iii. Will take off-line after one year, unless applicant requests extension of retention;
  - c. Employee Files
    - i. 5,300 total records
    - ii. Average file contains 75 pages (including pre-employment, employment, evaluations, benefits, medical)
    - iii. Will archive to near-line and microfilm after 6 years of being inactive (except card index)
2. Legal Services storage requirements
  - a. Open and closed files
  - b. Current total number of pages: 1,700,000 (open and closed)
  - c. Anticipate opening 750 files per year with an average file of 800 pages
3. Student Records storage requirements
  - a. Need 10 years of student records on-line
  - b. Average year contains 5,226 records (students), there are approximately fifteen pages for each record (folder); three of the fifteen sheets are double-sided, the remainder of sheets are single-sided
  - c. Will archive to near-line and microfilm after 10 years of students departure from the district.

## Conversion Requirements

Backfile to be converted	Scanning site	Record (folder) Total	Average # Document (Pages)	Total Conversion
Card Indexes (active and inactive)	Vendor	7,300	1	7,300
Applicant Files	Vendor	2,000	25	50,000
Active Employee Files	Vendor	5,300	75	397,500
				454,800
Legal Services files (scanned on-site)	Richland One	1,850		1,700,000

## Document Indexing Requirements

### Human Resources Employee Files

Most human resource information is currently keyed into the management information system MUNIS and is accessible by either entering the applicant/employee's social security number, last name or first name. Searches can also be conducted using a variety of information such as work location, position, etc. The current filing system is based on alphabetical order of the applicant/employee last name and a particular color of the folder:

Classified Applicant	Red
Certified Applicant	Blue
Classified Employee	Brown
Certified Employee	Light Green

In order to make all files accessible the following indexing system is suggested:

#### **Basic Indexing:**

Primary indexing should be done using the employee's social security number, last name, first name and middle initial.

#### **Card Index**

##### **Index: Basic Indexing + Location**

<b>Total Active</b>	<b>4,500</b>
<b>Total Inactive</b>	<b>2,800</b>

#### **Demographics:**

##### **Index: Basic Indexing + Doc Type (EEOC)**

EEOC card	<b>5,300</b>
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#### **Pre-employment section: (also the same for applicant files)**

##### **Index: Basic Indexing + Document type listed and other categories listed below**

Application by date and position(s)	<b>20,000</b>
Resume	<b>8,000</b>
Correspondence (by date)	<b>53,000</b>
Education (transcripts)	<b>30,000</b>
Reference Forms	<b>21,000</b>
Interview Forms (by position)	<b>18,000</b>
Exams/Exam Reports	<b>18,000</b>
SLED Report (by date)	<b>7,000</b>
Miscellaneous documents	<b>18,000</b>

#### **Employment Section:**

##### **Index: Basic Indexing + Document type listed and other categories listed below**

Certificate/License (by date expired)	<b>2,500</b>
Contracts	<b>14,000</b>
Correspondence by date	<b>17,000</b>
Personnel Transaction Forms (by date)	<b>21,000</b>
Orientation Documentation	<b>7,100</b>

**Medical Section:**

**Indexing: Basic Indexing**

DHEC form	5,300
Medical Questionnaire	5,300
Physical Certification forms	4,500
Total medical documents	15,100

**Evaluation Section:**

**Index: Basic Indexing + Document type listed and other categories listed below**

Correspondence (by date) 4,000

Additional Indexing: By Employee Classification (Certified, Classified), Date of Evaluation, Expiration Date of Evaluation

Certified Evaluations	42,000
Classified Evaluations	39,500
Total Evaluation Documents	85,500

**Benefit Section:**

**Indexing: Basic Indexing + effective date**

Notice of Election Form **40,000**

**Total Document Count**

**Active Files, Card indexes, and Inactive Card Indexes 436,780**

*Human Resources Applicant files*

Application by date and position(s)	8,000
Resume	5,000
Correspondence by date	5,000
Education (transcripts)	5,400
Reference Forms	7,000
Interview Forms	5,500
Exams/Exams Reports	9,000
SLED Report	2,100
Certifications	1000
Miscellaneous documents	2000
<b>Total Applicant documents</b>	<b>50,000</b>

**Total HRS Documents 466,780**

Legal Services Files

**Sub-files** should be as follows:

**Tort**

- Name of employee
- The name of the court: Federal Court or State Court
- Name of the plaintiff
- Name of the defendant
- Docket number
- Year of file (example 2000)
- Disposition
- Date received

**EEOC/SHAC**

- Name of employee
- SHAC claim number
- EEOC claim number
- Court: Federal Court or State Court
- Docket number
- Type of discrimination: Age, sex, disability, race, religion
- Year of file (example 2000)
- Disposition

**Real Estate**

- Property address/property description
- Tax map number
- Name of buyer
- Name of seller
- Name of Lessee
- Name of Lessor
- Year of file
- Disposition
- Document Type (Lease, correspondence, miscellaneous)

**Personnel File**

- Name of employee
- Name of Court: Federal Court, Criminal Court or State Court
- Docket number
- Year of file
- Type of complaint
- Disposition

## **Criminal Files**

- Name of employee
- Case caption
- Docket number
- Court: Federal Court or State Court
- Name of plaintiff
- Name of defendant
- Disposition

## **Other Legal Files – Misc.**

- Name of employee
- Type of case
- Court: Federal Court or State Court
- Docket number
- Disposition

## **Reference Files**

- Type of file
- Year of file

## **Internal Files**

- Name of department/school
- mail code
- Fiscal year

Dept Example:        Supt  
                              550  
                              2001

School Example:     Lower Richland  
                              170  
                              2001

## **Contractual (Agreements) Files**

- Name of department/Division
- Contact Person
- Date signed
- Date Received
- Contract Termination Date
- Program

## Questions from Vendors

These questions/answers replace any distributed at the pre-proposal conference.

1. Under 1.4.1 page 3, how many inactive employee records are there from 1945-1996? Are they on microfilm, microfiche and paper?

**The RFP is only requesting the imaging of active employees and applicants. As employees become inactive, the District will keep employees that are inactive within the past five years on-line, and archive employees inactive greater than five years to microfilm or DVD. A copy of the inactive employee's card index will remain on-line.**

2. Under 1.4.1 page 3, how are the employee cards currently indexed?

**They are filed by location (school/department), position (administrator, teacher, classified), and then name (alphabetical order) within those categories.**

3. Under 1.4.1 page 4, can we get physical samples of the employee card indexes and employee benefits forms?

**No. But you may visit Human Resource Services during the week of November 5<sup>th</sup> to view them.**

4. Under 1.4.1 page 4, what colors other than black and white are the employee benefit forms?

**The color distribution is as follows:**

**White and pink – insurance; yellow – HRS; goldenrod – employee. Past benefit forms must have the yellow scanned; future benefit forms will have the white copy scanned.**

5. Under 1.7 page 7, which system and what applications are being referred to in integration of time and billing systems and/or output time and billing? (i.e., is this a MUNIS product)

**We currently use Morning Star. However, please identify any of these systems you integrate with. We are not tied to any system. We are primarily requesting this integration for time management purposes.**

6. Under 2.6 page 16, what is the difference between Web Access Viewers and Application Access Users?

**The Web access viewers would be HRS customers: principals, directors, and department heads. The Application access users would be the HRS and Legal Services staff.**

7. Under 2.7 page 18, what is the definition of image retrievers?

**The image retrievers would be the web access viewers, defined in response to question # 6.**

8. Under 2.9.4 page 21, what type of integration are you looking for with the MUNIS system? (i.e., total integration with Informix 4GL or an Informix table that points the user to a separate Document Management database)

**For Employee Teaching Certificates integration, a text file of extracted data scanned from the certificate is needed.**

9. How is MUNIS used in the current manual workflow?

**All information contained on paper is keyed into MUNIS. Such as applicant information, benefits, employee basic and payroll information, evaluation and certification information, etc...**

10. How is the data currently put into MUNIS?

**It is keyed into the system.**

11. What is the estimated budget for this project?

**Budget to be negotiated with awarded vendor.**

12. For pricing purposes, does the District require a total price for the back-file conversion of documents? If the price is a total price, what number of images does the District want the Vendor to base their pricing on?

**Yes, the District does require a total price for back file conversion. See section 3.4.1 above for Conversion requirements and Document Indexing requirements.**

13. For active employee files and legal files that are required to be scanned are these part of the back-file to be priced in the services? If so, can these documents leave the site of the District?

**Yes, active employee files and legal files are part of the back file conversion. Although Legal files cannot leave the District site, the HRS files may leave the District site. Keep in mind, that HRS files must be available to the District within a 24 hour period, if needed.**

14. In 2.0 Project Overview, please define what is meant by Electronic Forms Processing. Is this a requirement in Phase I pricing?

**Richland One envisions applicants having the ability to key application information via a web-enabled application either internally or externally to the District. The form would capture the data to a text file that would be sent to an applicant tracking system (to be purchased by Richland One at a later date).**

**The District also envisions the personnel transaction form accessible to district department heads or principals via a web enabled application internally to the District. The form would capture the data, include a password protected signature, route the form to budget for approval, route the form to Human Resources for processing, then file it in the appropriate employee file.**

**Both are a requirement in Phase II – see section 2.1.1 above.**

15. In 2.1 Card Indexes, how does the District require the card indexes information to be accessible from the MUNIS Employee Master File? What does the District envision the system looking like and how does the District envision the working for the card indexes?

**We do not require the Card Indexes to be accessible through MUNIS.**

16. Does the District have a database of choice? If so, which and will the District supply the licenses for the database or should the vendor supply pricing for these?

**The district does not have a database of choice. Please supply the pricing for these.**

17. Does MUNIS Financials have a windows-based API or a way to extract data out to put into Alchemy?

**We are not specifying the complete integration at this time. We prefer you quote an hourly rate for integration on the cost sheet. Richland One IRM staff is capable of extracting data from MUNIS to a text file or uploading data into MUNIS from a text file.**

18. What is the full nature and scope of the desired integration between MUNIS and Alchemy?

**We are not specifying the complete integration at this time. We prefer you quote an hourly rate for integration on the cost sheet. Richland One IRM staff is capable of extracting data from MUNIS to a text file or uploading data into MUNIS from a text file**

19. Can you provide us with a listing of the pre-bid attendees?

**This information can be requested from Procurement Services on an individual basis. Please contact Donna Abdullah, Chief Buyer, for this information.**

20. How were the equipment requirements determined? In other words, how did the school district determine that three individual scanning stations and one high speed scanning station would be the appropriate number for the district's needs?

**The three individual stations consist of two personnel technicians and one legal services secretary. The District wants these individuals to have the ability to scan information from their desk, without having to leave their station. The one high speed scanning station is needed for peak period processing of information and will be available to all of Human Resources and Legal Services. As this project expands, we expect to expand this number.**

21. Can Richland One provide estimates of each backfile population? i.e. a paper estimate or a summary of the files?

**See section 3.4.1 Conversion Requirements above.**

22. Can Richland One summarize how each population is stored?

**For current filing system see section 1.4.1. For indexing information requirements see section 3.4.1 Document Indexing Requirements above.**

23. Will someone from the school district be responsible for shipping files offsite or is the vendor expected to provide these services?

**Vendor is responsible for packing and shipping files from and to the District. However, a Human Resource Services employee must verify all files in container prior to shipping from the District and a list of all files contained in packages returned to the District must be provided.**

a) Additionally, how much document preparation will be performed by the school district?

**All Human Resource employee and applicant folders will be prepped in the following manner: Staples, paper clips removed; 11 x 17 application separated into individual pages (8 ½ x 11); Documents will be in order by sections as defined in section 3.4.1 Document Indexing Requirements above. Legal Services documents will not be prepped.**

24. Since the majority of scanning cost is associated with document preparation/paper quality – Can an onsite paper survey be scheduled where we can see the actual paper?

**Yes, you may visit Human Resource Services during the week of November 5th to view them.**

25. Can Richland One provide an estimate of how much Microfilm is currently stored? Is that population to be digitized?

**The microfilm is not to be digitized.**

26. Within the RFP there is some reference to indexing mostly associated with the Employee Cards. Can Richland One provide an indexing summary for each population?

**See section 3.4.1 Document Indexing Requirements above.**

a) Additionally the document references that files are stored alphabetically by name (with the exception of the legal files) – Is there a database reference that can be extracted to match each file?

**The MUNIS, financial system can extract a list of employee names with the social security number to match each active employee file.**

27. Within the RFP there is priority of which documents should be converted first. Are there expectations as to how many of these populations must be converted?

**Priority and document totals are listed the correct order in section 3.4.1 Conversion Requirements above.**

28. The RFP mentions the need for OCR capabilities (Page 14 of 28). Do you have the requirement for ICR (Image Character Recognition – this allows the conversion of handwritten information to index or common text fields for handwritten forms or will the indexing information be entered manually into the system? Refer to Page 3 (Employee Index Cards), Page 7 (Most documents should have the capability of being converted to text..) and page 9 (Card Indexes) of 28.

**Page 3 and Page 9 reference: The MUNIS, financial system can extract a list of employee names with the social security number to match each active employee file or card index. The District would prefer using bar codes created from this information to be used for automated indexing purposes, as this would be more accurate. The OCR capabilities are needed in Legal Services (see question 30). If quoting software needed for ICR, please add this to the cost sheet for additional phases, not phase one.**

**Page 7 reference: See response to question # 30.**

29. Are the MUNIS database files ODBC compliant and would you allow read only or read/write access?

**We are not specifying the complete integration at this time. We prefer you quote an hourly rate for integration on the cost sheet. Richland One IRM staff is capable of extracting data from MUNIS to a text file or uploading data into MUNIS from a text file.**

30. Please explain the following request on Page 7 of 28 further. “An individual should be able to image some documents directly from the desktop computer.” Does that mean convert WordPerfect or Word documents to image? Or are you referring to some type of COLD requirements?

**Some legal documents are kept as a matter of reference to be used at a later date for District purposes. To eliminate re-keying these documents, Legal Services requires them to be scanned and available in a format that allows them to be included in future documents. (OCR)**

31. Please explain further the specific integration you require with the MUNIS system.

**See response to question # 8.**

a) Does MUNIS support icon links (html based) for access to image files?

**The District will not be integrating images with the MUNIS system.**

b) Are you expecting function key accesses to the images?

**No. The District will not be integrating images with the MUNIS system.**

c) Will Richland County School District One’s staff write the API integration, if necessary, or is that expected of the vendor?

**We are not specifying the complete integration at this time. We prefer you quote an hourly rate for integration on the cost sheet. Richland One IRM staff is capable of extracting data from MUNIS to a text file or uploading data into MUNIS from a text file.**

d) Refer to Page 7 (integration with time and billing system..) and Page 9 of 28 (Card Indexes)

**See response to question # 5.**

32. On page 8 of 28, you state the need for “Imaging of basic employee information kept on large index cards and within the district’s financial system (MUNIS)”. Do you want the data in MUNIS converted to image or simple stored in accessible records (forms) within the new system?

**The data in MUNIS that is kept on the large index cards will not be stored in the imaging system.**

33. Are you requiring out sourcing (having the vendor provide at a cost) the conversion of your “back file” data to the new system or is this an optional feature to be quoted as such? Page 8 of 28 bullet “Conversion/Scanning of “back file” data to provide a turn-key system”

**Conversion of back file data is required, to provide a turn-key system.**

34. Was this project originally budgeted for and if so, what is the budget?

**Budget to be negotiated with awarded vendor.**

35. Did any outside firm help with the construction of the RFP and if so, who are they and will they be excluded from bidding?

**No outside firm helped with the construction of this RFP. Research was conducted, and RFP's were collected from other state and government agencies that had previously conducted a project of this nature.**