



Orcutt Union School District
500 Dyer Street
Santa Maria, CA 93436
(805)938-8900

REQUEST FOR PROPOSAL

RFP # 50020232024

Document Management System

NOTICE OF REQUEST FOR PROPOSAL (RFP)

NOTICE IS HEREBY GIVEN that the Orcutt Union School District (OUSD), will receive up to, but not later than 3 o'clock p.m. on Wednesday, September 27, 2023, emailed written proposals for the award of contract for Scanning Software and Services.

Proposals will be received by email to the office of Business Services, Orcutt Union School District, to Administrative Assistant, Mary Kay Tsamasfyros mtsamasfyros@orcutt-schools.net in accordance with this RFP. Each proposal must conform and be responsive to the requirements of this RFP, a copy of which is now on the OUSD website at orcuttschools.net. Requests for proposal documents should be directed to Mary Kay Tsamasfyros mtsamasfyros@orcutt-schools.net or call (805)938-8916.

Interested proposers should direct questions in writing to Mary Kay Tsamasfyros mtsamasfyros@orcutt-schools.net or call (805)938-8916.

Answers to questions and any addenda, as needed, will be posted on the OUSD website on the date specified in the RFP Schedule, provided herein.

The OUSD reserves the right to waive any informalities or irregularities in received submittals. Also, OUSD reserves the right to reject any or all submittals and to negotiate contract terms with one or more proposers for one or more work items. The OUSD retains the sole discretion to determine issues of compliance and to determine whether a proposer is responsive, responsible, and qualified.



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Document Management System

Background and Introduction

This Request for Proposal (RFP) is for the procurement of a document management system (DMS) for our Orcutt Union School District. The DMS will be used to store, manage, and track all of our student and personnel files. The system must be able to convert all of our existing paper files into digital files, and it must also be able to scan, categorize, and index the documents. The system must also be able to provide secure access to the documents, and it must be backed up regularly.

Scope of Work

The scope of work for this project includes the following:

- The selection and implementation of a DMS
- The conversion of all existing paper files into digital files
- The scanning, categorization, and indexing of the digital files
- The secure storage of the digital files in the cloud
- The regular backup of the digital files
- The boxing and removal of documents
- The destruction of documents
- The courier services related to the documents

Requirements

The DMS must meet the following requirements:

- It must be able to store and manage a large volume of documents.
- It must be able to convert paper files into digital files.
- It must be able to scan, categorize, and index documents.
- It must provide secure access to documents.

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- It must be easy to use and manage.
- It must be scalable.
- It must be able to integrate with current systems.
- It must be backed up regularly and have disaster recovery data components.
- It must be searchable

Evaluation Criteria

The proposals will be evaluated based on the following criteria:

- Overall proposal suitability
- The functionality of the DMS
- The price of the DMS
- The level of support offered by the vendor
- The vendor's experience with similar projects

Timeline

The DMS must be implemented within six months of the selection of the vendor.

RFP Content Requirements

Section	Description
Cover Page	<p>The cover page should include the name of the vendor, the contact person, and the date of the proposal. It should also contain the name and number of this RFP for our District - <i>Orcutt Union School District</i></p> <p>It should specifically contain the following information:</p> <ul style="list-style-type: none"> ● Company name. ● Address. ● Telephone. ● Fax. ● Website. ● Name and email of main contact.



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	<ul style="list-style-type: none"> • Federal Tax I.D. Number. • License or Registration Number.
Table of Contents	The table of contents should list all of the sections in the proposal and the page numbers where they can be found.
Executive Summary	The executive summary should provide a brief overview of the proposal, including the vendor's solution, the benefits of the solution, and the pricing.
Problem Statement	The problem statement should clearly define the problem that the DMS is intended to solve.
Solution Overview	The solution overview should provide a detailed description of the vendor's DMS solution.
Functional Requirements	The functional requirements should list all of the features and capabilities that the DMS must have.
Non-Functional Requirements	The non-functional requirements should list all of the other requirements for the DMS, such as performance, security, and scalability.
Implementation Plan	The implementation plan should describe how the DMS will be implemented, including the timeline, the resources required, and the risks involved.
Support Plan	The support plan should describe how the vendor will provide support for the DMS, including the level of support, the response time, and the contact information.
Pricing	The pricing section should list the price of the DMS, as well as any additional fees or charges.
References	The references section should list the names and contact information of three customers who have used the vendor's DMS.
Appendices	The appendices should contain any additional information that is not included in the main body of the proposal, such as technical specifications or user manuals.

Selection Process

The proposals will be reviewed and evaluated by a team of stakeholders, who will assess the proposals against the evaluation criteria (listed in prior section).

OUSD reserves the right to reject any or all submittals and to negotiate contract terms with one or more proposers for one or more work items. OUSD reserves the right to award all, part, or none of the work



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described in this RFP. Each submittal will be scored by an RFP evaluation committee. OUSD reserves the right to contract with any entity responding to this RFP for all or any portion of the work described herein, to reject any proposal as non-responsive, and/or not to contract with any proposer for the services described herein. OUSD makes no representation that participation in the RFP process will lead to an award of contract or any consideration whatsoever. OUSD reserves the right to contract with a firm that did not participate in this RFP process.

FULL OPPORTUNITY

OUSD hereby affirmatively ensures that Disadvantaged Business Enterprises (“DBE”), Small Local Business Enterprises (“SLBE”), Small Emerging Local Business Enterprises (“SELBE”), and Disabled Veterans Business Enterprises (“DVBE”) shall be afforded full opportunity to submit proposals in response to this RFP and no proposer will be discriminated against on the basis of race, color, gender, sexual orientation, political affiliation, age, ancestry, religion, marital status, national origin, medical condition or disability in any consideration leading to the award of the contract. No qualified disabled person shall, on the basis of disability, be excluded from participating in, be denied the benefits of, or otherwise be subjected to discrimination in any consideration leading to the award of contract.

RESTRICTIONS ON LOBBYING AND CONTACTS

From the period beginning on the date of the issuance of this RFP and ending on the date of the award of the contract, no person or entity submitting in response to this RFP, nor any officer, employee, representative, agent, or consultant representing such a person or entity, shall contact through any means or engage in any discussion regarding this RFP, the evaluation/selection process, or the award of the contract with any member of the OUSD, Board of Education, selection members, or any member of the Citizens' Oversight Committee. Any such contact shall be grounds for the disqualification of the proposer.

MODIFICATIONS

Changes in or additions to the proposal, recapitulations of the work proposed upon, alternative proposals, or any other modification of the proposal which is not specifically called for in the contract documents may result in the OUSD's rejection of the proposal as not being responsive to the invitation to propose. No oral or telephonic modification of any proposal submitted will be considered.

EXAMINATION OF SITE AND RFP DOCUMENTS

Each proposer shall fully acquaint himself with the conditions so that he may fully understand the facilities, difficulties, and restrictions attending the execution of the work under the contract. Proposers shall thoroughly examine and be familiar with the specifications and seek clarification if needed. The failure or omission of any proposer to receive or examine any contract documents, form, instrument, addendum, or other document or to acquaint himself with any relevant site conditions shall in no way relieve any proposer from obligations with respect to his proposal or to the contract.

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Each proposer, by submitting the proposal, represents that he has read and understands the Agreement and Proposal documents and any and all related reports and information. After executing the Agreement, no consideration will be given to any claim of misunderstanding of the documents.

Other Requirements

1. Fingerprinting. By law it is the OUSD's responsibility to determine whether a contractor must provide fingerprint certification. Pursuant to Education Code section 45125.1, a fingerprinting compliance certificate is included as part of the contract documents.
2. Drug-Free Workplace. Proposer warrants that proposer is knowledgeable of the Drug-Free Workplace Act of 1990 (Government Code Section 8350 et seq.), regarding a drug-free workplace and shall abide by and implement its statutory requirements.
3. Current Contract. If the winning firm already has a contract with any of the OUSD's authorized LEA users, the firm must be willing to terminate the prior contract and permit the LEA user to use the firm's services in accordance with the OUSD's contractual terms and corresponding license. This is negotiable, but highly preferred.

Schedule

OUSD reserves the right to change the dates on the schedule without prior notice.

EVENT	DATE/DEADLINE
Release RFP	Thursday, September 14, 2023
Deadline for Questions from Proposers	Friday, September 23, 2023 by noon.
Publish Addenda and Responses to Proposers on OUSD website	Monday, September 25, 2025 by noon.
Deadline to Submit Proposals	Wednesday, September 27, 2023 by 3:00 p.m.
Award Contract	Wednesday, October 11, 2023
Negotiate and Execute Agreement	By Friday, October 27, 2017

WE THANK YOU FOR YOUR INTEREST IN THIS PROJECT!



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Contact Information

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Orcutt Union School District, to Administrative Assistant, Mary Kay Tsamasfyros
mtsamasfyros@orcutt-schools.net

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Thank you for your interest in this project.

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