



INVITATION FOR BID NUMBER AEPA IFB #010-F

DOCUMENT MANAGEMENT

PART C – BID FORMS

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Bid Submittal Organization and Check List

1. Bid Submission instructions are found in Section E of Part A of the bid documents.
2. The Part C Bid Forms shall be submitted in both printed and electronic copy. Bidders shall include an exact paper copy of the electronic submission, paper copy(ies) of items that cannot be made a part of the electronic submission, and the electronic forms in the sealed bid package. In case of discrepancies, the printed responses will prevail over electronic submissions.
3. In order to insure that every bid receives a fair evaluation and comparison, it is required that each bid be organized in a three-ring binder with an inside pocket and a set of dividers is required.
4. It is suggested that the bidder preparing a response check off each required item as it is completed. The same list will be used by AEPA evaluators to ascertain that the bid is complete.
5. Any submittals too large to secure in the binder must be clearly labeled with the name of the bidder.
6. One original copy of the bid shall be submitted.

7. All documents with signatures shall have original ink signatures.
8. Electronic data must be provided on CD. Electronic media shall be clearly identified and labeled by including the vendor name, name of the bid and date. Electronic media must be placed in a protective pouch. Electronic price lists shall be in Microsoft Excel 2007 or less and shall allow for sorting on any of the fields listed below. Other documents may be submitted as Word or PDF files.

Bid Submittal Checklist and Organization of Your Binder

Divider	Form	Description	Signature Required	Hard Copy	Word or PDF File on CD	Excel File
1	A	_____ Bid Affidavit Signature Page (Notarized Hard Copy)	X	X	X	
1	B	_____ Acceptance of Bid and Contract Award	X	X		
2	C	_____ Proposal Description (Minimum of Seven Pages in Response to Each of Seven Key Requirements/ signature on last page)	X	X	X	
2	D	_____ Questionnaire for Bidders	X	X	X	
3	E	_____ Company Information	X	X	X	
4	F	_____ Exceptions to Terms, Conditions and Specifications	X	X	X	
5	G	_____ Bid Pricing (This also includes a printout of the electronic pricing.)		X	X (Excel)	X
6		_____ Appendix with Catalogs, Slicks, Other Information, etc.		X		
Left Pocket		_____ Electronic Media CD (all required pages above)		X	X	X

_____ Check or initial here after all questions have been answered and data provided as requested. (Omissions and errors may cause bid to be rejected.)

A. BID AFFIDAVIT SIGNATURE PAGE

AFFIDAVIT

1. The undersigned, duly authorized to represent the persons, firms and corporations joining and participating in the submission of the foregoing bid (such persons, firms and corporations hereinafter being referred to as the bidder), being duly sworn, on his/her oath, states that to the best of his/her belief and knowledge no person, firm or corporation, nor any person duly representing the same joining and participating in the submission of the foregoing bid, has directly or indirectly entered into any agreement or arrangement with any other bidders, or with any official of the *Member Agency*, or any employee thereof, or any person, firm or corporation under contract with the *Member Agency* whereby the bidder, in order to induce the acceptance of the foregoing bid by the *Member Agency*, has paid or is to pay to any other bidder or to any of the aforementioned persons anything of value whatever, and that the bidder has not, directly nor indirectly entered into any arrangement or agreement with any other bidder or bidders which tends to or does lessen or destroy free competition in the letting of the contract sought for by the foregoing bid.
2. This is to certify that the bidder, or any person on his/her behalf, has not agreed, connived, or colluded to produce a deceptive show of competition in the manner of the bidding or award of the referenced contract.
3. This is to certify that neither I, nor to the best of my knowledge, information and belief, the bidder, nor any officer, director, partner, member or associate of the bidder, nor any of its employees directly involved in obtaining contracts with the State of *Member Agency*, *Member Agency*, or any subdivision of the state has been convicted of false pretenses, attempted false pretenses, or conspiracy to commit false pretenses, bribery, attempted bribery or conspiracy to bribe under the laws of any state or federal government for acts or omissions after January 1, 1985.
4. This is to certify that the bidder or any person on his behalf has examined and understands the terms, conditions, scope of work and specifications, and other documents of this solicitation and that any and all exceptions have been noted in writing and have been included with the bid submittal.
5. This is to certify that if awarded a contract, the bidder will provide the equipment, products, commodities, licenses, subscriptions and/or services to members and affiliate members of the Agency in accordance with the terms, conditions, scope of work and specifications and other documents of this solicitation in the following pages of this bid.
6. This is to certify that we have completed, reviewed, approved and have included all information that is required in Sections C, D, E, F and G of these bid forms.

Authorized Representative (Please print or type)

Mailing Address

Title (Please print or type)

City, State, Zip

X

Signature of Authorized Representative

_____ Date

_____ Phone

_____ Fax

Subscribed and sworn to before me this _____ day of _____

Notary Public in and for County of _____, State of _____

My commission expires: Signature: _____

B. ACCEPTANCE OF BID AND CONTRACT AWARD

AEPA IFB 010-F DOCUMENT MANAGEMENT

**ACCEPTANCE OF BID
and
CONTRACT AWARD**

TO BE COMPLETED BY

In compliance with the Invitation to Bid, the undersigned warrants that I/we have examined the Instructions to Bidders, and, being familiar with all of the conditions surrounding the proposed projects, hereby offer and agree to furnish all labor, materials, and supplies incurred in compliance with all terms, conditions, specifications and amendments in the INVITATION TO BID and any written exceptions to the bid. Signature also certifies understanding and compliance with the certification requirements of the Agency Terms and Conditions and the special Terms and Conditions. The undersigned understands that his/her competence and responsibility and that of his proposed subcontractors, time of completion, as well as other factors of interest to the Agency as stated in the evaluation section will be a consideration in making the award.

Company Name _____ Date _____
Company Address _____ City _____ State _____ Zip _____
Contact Person _____ Title _____
Authorized Signature (ink only) _____ Title _____

ACCEPTANCE OF BID AND CONTRACT AWARD TO BE COMPLETED ONLY BY AGENCY

Your bid for contracting services is hereby accepted. As contractor, you are now bound to sell the materials and services listed by the attached bid based upon the solicitation, including all terms, conditions, specifications, amendments as set forth in the Invitation for Bid. As contractor you are hereby cautioned not to commence any billable work or provide any material or service under this contract until contractor receives an executed purchase order from the Agency. The parties intend this contract to constitute the final and complete agreement between the Agency and contractor, and no other agreements, oral or otherwise, regarding the subject matter of this contract, shall bind any of the parties hereto. No change or modification of this contract shall be valid unless it shall be in writing and signed by both parties to this contract. If any provision of this contract is deemed invalid or illegal by any appropriate court of law, the remainder of this contract shall not be affected thereby. The term of the agreement shall commence on award and continue until February 28, 2011 unless terminated, canceled or extended. By mutual written agreement, the contract may be extended for three additional 12-month periods ending on February 29, 2012, February 28, 2013 and February 28, 2014.

Awarding Agency: _____

Agency Executive _____

Awarded this _____ day of _____ Contract Number _____

C. PROPOSAL DESCRIPTION – DOCUMENT MANAGEMENT

Company Name _____

Section 1 -- Describe your solution for Secure Offsite Document Storage, including procedures and techniques for:

- a) Controlled temperatures
- b) Controlled humidity
- c) Theft and vandalism protection
- d) Fire prevention
- e) Controlled chain of custody and prevention of unauthorized access
- f) Options for vaulted storage

(Insert additional pages, if necessary)

C. PROPOSAL DESCRIPTION – DOCUMENT MANAGEMENT

Company Name _____

Section 2 -- Describe your solution for Secure Document Pick Up and Retrieval, including procedures and techniques for:

- a) Prevention of co-mingling records of other accounts
- b) Training and background checks of personnel
- c) Vehicle locking and alarm mechanisms
- d) Chain of custody for documents
- e) Ascertaining whereabouts of vehicles at all times during records' transport
- f) Fire prevention

(Insert additional pages, if necessary)

C. PROPOSAL DESCRIPTION – DOCUMENT MANAGEMENT

Company Name _____

Section 3 -- Describe your solution for Secure Document Shredding & Destruction, including procedures and techniques for:

- a) On-site destruction of documents
- b) Off-site destruction of documents
- c) Media other than paper to be destroyed
- d) Destruction of hardbound books and obsolete textbooks as allowed by law
- e) Chain of custody
- f) Use of on-site secure containers
- g) Certification of destruction
- h) Environmentally friendly disposal or recycling of remnants
- i) Integration with a formal records management program

(Insert additional pages, if necessary)

C. PROPOSAL DESCRIPTION – DOCUMENT MANAGEMENT

Company Name _____

Section 4 -- Describe your solution for Secure Electronic Information Storage & Retrieval, including procedures and techniques for:

- a) Automatic back-up of live files
- b) Archiving electronic files (include a description of methods used)
- c) Desktop on-line retrieval of archived files
- d) Conversion of paper documents to electronic files
- e) E-mail management
- f) Compliance with government rules for legal discovery & records retention
- g) Encryption services
- h) Prevention of access by hackers and unauthorized individuals
- i) Redundancy and multi-location storage in the event of a disaster
- j) On-site disaster recovery support
- k) Destruction of electronic records as allowed by law
- l) Certification of destruction
- m) Indexing
- n) Integration with a records management program or software
- o) PC and server data protection

(Insert additional pages, if necessary)

C. PROPOSAL DESCRIPTION – DOCUMENT MANAGEMENT

Company Name _____

Section 5 -- Describe your solution for Records Management Software, including features that:

- a) Are accessible from employee desktops
- b) Are remotely hosted
- c) Track active documents and records
- d) Track old and archived documents and records
- e) Track onsite and offsite documents
- f) Track both paper and electronic documents
- g) Track from origination, to archive, to destruction
- h) Produce user-friendly reports on records by status and by type

(Insert additional pages, if necessary)

C. PROPOSAL DESCRIPTION – DOCUMENT MANAGEMENT

Company Name _____

Section 6 -- Describe your solution for Computer Data Protection, including procedures and techniques for:

- a) Backing up data
- b) Quickly restoring lost or damaged files following a disaster
- c) Thwarting viruses and Trojans from infecting systems
- d) Prevention of unauthorized access to IT systems
- e) Vaulted storage of tapes and drives
- f) Maintaining compliance with privacy laws, rules and policies

(Insert additional pages, if necessary)

C. PROPOSAL DESCRIPTION – DOCUMENT MANAGEMENT

Company Name _____

Section 7 -- Describe your solution for Document Management Consulting Services, including advice and consultation for:

- a) Best practices in document management
- b) New laws and regulations
- c) Document warehousing and storage
- d) Retention and compliance management based on the specific laws of individual states
- e) Legal discovery and litigation
- f) Imaging
- g) Strategies for document identification and management
- h) Indexing and document categorization
- i) Conversion of documents to electronic format
- j) Best use of personnel in document management tasks
- k) Software and hardware for document management
- l) Other needs as may be identified by individual school districts

(Insert additional pages, if necessary)

X _____

Signature (Same signature as on Bid Affidavit Signature and Acceptance Form)

D. QUESTIONNAIRE FOR BIDDERS – DOCUMENT MANAGEMENT

Company Name _____

Please check Yes/No answers. If space provided is inadequate, indicate, “see attached” and label the attachment with the question number.

Question	Check Yes or No (or remove word for electronic copy)		For Evaluators Use Only
	___Yes	___No	
1. Can your company serve all AEPA states with the best service offered?	___Yes	___No	
Comments:			
2. Do you currently have representatives for all AEPA states? (If no, a plan and timeline for providing these services is to be attached.)	___Yes	___No	
Comments:			
3. Is your pricing guaranteed as per language of the terms and conditions?	___Yes	___No	
Comments:			
4. Is your proposed software a hosted, web-based solution?	___Yes	___No	
Comments:			
5. Does your proposal provide a solution for offsite document storage?	___Yes	___No	
Comments:			
6. Does your proposal provide a solution for the pick-up and delivery of records stored offsite?	___Yes	___No	
Comments:			
7. Does your proposal provide a solution for the off-site storage of electronic records?	___Yes	___No	
Comments:			
8. Does your proposal provide a solution for on-site computer data protection?	___Yes	___No	
Comments:			
9. Does your proposal provide for consulting services?	___Yes	___No	
Comments:			

10. Is your company capable of providing advice on the unique records retention requirements for school districts in each of their respective states?	___Yes	___No	
Comments:			
11. Does your company provide technical and customer service assistance for a full business-day in all times zones of the continental United States?	___Yes	___No	
Comments:			
Other Comments:			
<p>12. Indicate the level of support you are offering in this bid. (A bid will be determined nonresponsive if this question is unanswered.) Fees bid in this proposal are:</p> <p>___ a. The same as we offer on single school district bids.</p> <p>___ b. The same as we offer to cooperatives and state purchasing departments.</p> <p>___ c. Better than we offer to cooperatives or state purchasing departments.</p> <p><i>If line b or c is checked, indicate the percent lower (on single items) than the best price offered to educational institutions, cooperatives, or state purchasing departments.</i></p>			
Two percent (2%)	___ Three percent (3%)	___ Four percent (4%)	
Five percent (5%)	___ Six percent (6%)	___ Other _____%	

X _____

Signature (Same signature as on Bid Affidavit Signature and Acceptance Form)

E. COMPANY INFORMATION

Note: This is a sample form. Actual data must be provided on disk, and printed. Original must be signed and inserted in the bid after it is printed.

Proper evaluation of bidders requires information about their companies.

- 1a. Public Companies must provide their most recent yearly report to stockholders.
- 1b. Private Companies must answer the questions below.
 - a. Provide a brief history of your company that includes the type of business and its philosophy of doing business. If the bidder has recently purchased an established business, or has proof of prior success in this business, or a closely related business, please provide written verification.
 - b. Indicate the location of the headquarters of the company. List any branch offices in the state of any AEPA member. Provide the name, title, qualifications and experience of the employee that will coordinate the work and be the general contact for this contract.
 - c. For purposes of determining a bidder's ability to perform financially, attach a letter from your financial institution that indicates the line of credit available to you currently, and evidence of financial stability over the past three (3) years. This letter does not need to identify a dollar amount; instead, a credit range should be indicated. (For example, "credit in the low six figures" or "a credit line exceeding five figures").
2. Gaps sometimes exist between management (those who respond to IFB's) and sales staff (those who contact the public educational institutions) which results in problems. Provide the names your key sales people, phone numbers and states for which they are responsible.

X

Signature (Same signature as on Bid Affidavit Signature and Acceptance Form)

G. Pricing Form

- Bid pricing shall be submitted on Excel spreadsheets following the format supplied on the following page. An Excel copy of the template is posted on the AEPA website with this IFB. Hardcopy printouts shall include page numbers on all pages.
- Use the format on the following page to price all equipment, licenses, services, supplies, and other chargeable items you wish to place on contract. If you have a printed price list, you may also attach it.

G. SAMPLE PRICE LIST FOR DOCUMENT MANAGEMENT

Company Name _____

Specification Category	Product or Service Description	Unit of Measure	Term	Rate Card Price	Discount	Final Effective Unit Price
Paper Document Storage	Vaulted Storage	15" Letter Box	Month	\$1.00	.01	.99
Paper Document Storage	Pick-Up Service	24" Legal Box	Each	\$1.00	.02	.98
Electronic Information Storage and Retrieval	Electronic Archive Service	Megabyte	Month	\$1.00	.03	.97
Document Management Consulting	Advice on Discovery and Litigation	Hour	Each	\$100.00	.10	90.00

(End of Part C)