



Request for Proposal

Maintenance and Support of Laserfiche Enterprise Content Management System

Proposals Due: April 24, 2020 5:00 p.m. (local time)

**Port of Bellingham
1801 Roeder Avenue
Bellingham, WA 98225**

MarlenaH@portofbellingam.com

Attention: Marlena Hicks
Public Records Officer

EMAIL SUBMITTALS ARE PREFERRED AT THIS TIME

April 10, 2020

REQUEST FOR PROPOSAL

GENERAL

The Port of Bellingham (Port) is soliciting proposals from vendors who can provide ongoing support for the Laserfiche Avante software that forms the basis of our ECM system. The Port has implemented Laserfiche Avante as its central electronic records repository and uses Laserfiche as an archival system. Laserfiche increases transparent records management, automates document-centric business processes, and files using the Laserfiche Automated Workflow functionality and Laserfiche Forms. In addition to using the robust functionality of Laserfiche, the Port also intends to have Laserfiche interact with other software applications in use by the Port such as DocuSign, GIS, and Microsoft Dynamics GP.

The Port desires a vendor who has outstanding products, proven experience, a seamless transition plan, the ability to train users, and the ability to provide excellent customer service.

The Port will be the sole judge as to which proposal best suits the Port's requirements for this system. This request for proposals is intended to be part of a competitive bidding process. Although cost is a consideration in this proposal, in accordance with RCW 39.04.270, the Port is not required to purchase software based solely upon the lowest bid.

The Port may amend, in whole or in part, any terms or provisions of this RFP prior to the RFP closing time. Amendments will be in writing and will be posted on the RFP website at <https://www.portofbellingham.com/bids.aspx>. Vendor agrees that the Port shall not be liable for any claim based on ambiguity of which the Vendor knew and did not inform the Port of or of which the Vendor should have reasonably known. It is the sole responsibility of the Vendor to visit the website throughout the proposal process for any changes to the RFP documents issued by the Port; the Vendor agrees that the Port shall not be liable for any claim based on the Vendor failure to monitor the website for changes.

In the event that clarification regarding the understanding of the requirements and instructions specified by the Port is necessary, vendors should contact the Public Records Officer in writing or by email prior to the submission of their proposals. The final cut-off time and date for questions will be 5:00 p.m. on April 17, 2020. All questions concerning this RFP are to be emailed to the Public Records Officer at MarlenaH@portofbellingham.com. Any oral communications from the Public Records Officer will be considered unofficial and non-binding on the Port. Vendors should rely only upon written statements issued by the Public Records Officer.

The Port reserves the right to accept or reject in part or in entirety any or all proposals received as a result of this request. Any decisions by the Port shall be final and conclusive.

The Port reserves the right to refuse any respondent who does not meet the requirements of this RFP or has had an agreement or contract canceled or threatened to be canceled due to failure to perform or for illegal activity.

It is incumbent upon the respondents to independently confirm the accuracy of all information contained within this RFP.

Respondents will not be reimbursed for any costs that they incur in preparing their RFP responses.

REQUEST FOR PROPOSAL

The Port of Bellingham is a public agency and is subject to the Public Records Act. Any information provided in response to this RFP may be subject to public disclosure if requested through a written public disclosure request.

Vendors may (1) email a digital version to MarlenaH@portofbellingham.com **OR** (2) may submit one original hard copy received by the Port of Bellingham at 1801 Roeder Avenue, Ste. 146 – Bellingham, WA 98225.

PLEASE NOTE: EMAIL SUBMITTALS ARE PREFERRED AT THIS TIME. Special coordination will be required for those who wish to submit original hard copies; please contact Marlena Hicks (MarlenaH@portofbellingham.com) no later than 24 hours prior to the date/time set for closing to coordinate delivery.

BACKGROUND

The Port of Bellingham is a municipal corporation that serves Washington's Whatcom County community by providing public transportation facilities, promoting economic development, providing stewardship of the commercial and industrial waterfront and by working with other agencies to provide needed public infrastructure. Port administrative offices are located in Bellingham, Washington, ninety miles north of Seattle. The Port leases more than 1.2 million square feet of industrial and commercial property to over 200 tenants, operates an international airport that handles over 330,000 passengers annually, operates two full service marinas with over 2,000 available slips, and operates a cruise terminal, a shipping terminal, and a multimodal transportation center.

The Port employs approximately 100 full time and 24 seasonal employees. There are currently 20 users across the following departments:

- Aviation
- Executive
- Facilities- Engineering & Contracts
- Real Estate
- Records Management

Port staff currently have varying roles in using the software. Some are consistently updating records available through the public portal in order to reduce the Port's volume of public records requests, while others are building databases of historical records to use as a resource for current and future projects. As a public agency, the Port has over 40 years of archival records that require the specific records management tools that Laserfiche provides. The Port has ongoing long-term projects and daily activities that generate large amounts of documents that will require digital solutions in the future. Some users will have full licenses while others will only need a read version. The Port currently owns and operates two servers, one being a web server, for the Laserfiche software.

PROPOSAL SUBMISSIONS

All submissions become property of the Port and will not be returned. All conditions contained in this RFP are considered accepted by the vendor in any proposal submitted. The accepted proposal will become part of the formal contract and will be included as an

REQUEST FOR PROPOSAL

attachment to the contract. The vendor must include a copy of their proposed agreement and ongoing maintenance plan with their submission.

To be considered qualified, vendors submitting proposals must be registered as an authorized Laserfiche vendor in Washington State and demonstrate a minimum of four (4) years of experience working with Laserfiche Avante.

The contract term will be for one (1) year with the option to renew up to two (2) additional years, subject to Port Commission approval of the annual budget.

Vendors must submit pricing for all three (3) years with costs shown by year.

Proposals having any erasures or corrections thereon may be rejected unless explained or noted over the signature of the proposer.

Vendors shall submit proposals on company letterhead and be signed with an authorized signature. Proposals by a partnership should be signed with the partnership name by one of the members of the partnership or by an authorized representative, followed in either case by the signature and title of the person signing. Proposals by corporations must be signed with the name of the corporation, followed by the signature and designation of the president, vice president, or other person authorized to bind the corporation to the proposal specifications and pricing. By signing this proposal, the undersigned hereby acknowledges that they are authorized and duly bound to execute this document on behalf of the company and that his/her signature is binding on the company.

Proposals shall include the following sections:

1. **Vendor's Experience and Past Performance:** Proposal shall include descriptions of previous successful maintenance and support contracts for similar integrated systems, including one example of a contract with a local government.
2. **Customer Service and Technical Support:** Proposal shall include descriptions of all types of customer service and technical support available through the vendor. This includes, but is not limited to, dedicated account representatives, 24/7 technical support options, and any additional support packages available for purchase.
3. **Professional and Training Services:** Proposal shall include descriptions of professional and technical services available to enhance the software, as well as list the options available for training users at all levels of access and experience. This includes, but is not limited to, designing business processes, consultation on repository design and function, and complimentary or paid training services.
4. **Price:** Proposal shall include a price breakdown for all annual maintenance costs for the products listed below, the cost of future software upgrades, and the pricing structure for all service, support, professional, and training package offerings.

REQUEST FOR PROPOSAL

Product Description	Quantity
Laserfiche Avante Server for MS SQL	1
Laserfiche Records Management Module	1
Laserfiche Avante Full Named User	20
Laserfiche Avante Web Access	20
Laserfiche Avante Standard Audit Trail	20
Laserfiche Avante Forms Professional	20
Laserfiche Avante Forms Portal	1
Laserfiche Avante Starter Public Portal	1
Laserfiche Avante Quick Fields	3
Laserfiche Avante Zone OCR and Validation Package	2
Laserfiche Avante Real Time Lookup and Validation Package	3
Laserfiche Avante Connector	20

5. **Other:** Describe any other relevant experience, service options, or costs not discussed above.

PROPOSAL EVALUATION

Each proposal will be scored independently by the members of an evaluation committee. Once all of the responses have been scored, the committee will compare scores and rank the proposals according to their value to the Port. The value of the proposals will be rated in each of the categories listed below. The Port shall select the highest ranked vendor for award based on these scoring criteria.

Evaluation Criteria:

Points:

1	Experience & Past Performance	25
2	Customer Service & Technical Support	25
3	Professional & Training Services	25
4	Price	25
	Sub Total	100

- Vendor's Experience & Past Performance: Evaluation based on the vendor's previous successful maintenance and support of similar integrated systems, especially with entities in the public sector.
- Customer Service and Technical Support: Evaluation based on the types of customer service and technical support available through the vendor.
- Professional and Training Services: Evaluation based on the professional and technical services available to enhance the software, and the options available for training software users.
- Price: Evaluation based on the costs of the services described above. Pricing will be evaluated based on pre-tax amounts.

Points awarded for Price will be calculated using the formula shown below. The vendor with the lowest **Total Proposal** price will receive the maximum allotted points for pricing. All other vendor's pricing points will be proportionate to the most favorable pricing. The example calculation below shows that a vendor whose price is

REQUEST FOR PROPOSAL

twice as much as the lowest proposed price would receive only half of the maximum available points. Points will be rounded to two places to the right of the decimal point using standard rounding method.

Lowest Total Proposal Price	÷	Other's Total Proposal Price	x	Maximum Available Points	=	Awarded Price Points
\$100	÷	\$200	x	25 pts	=	12.5 pts

The Port reserves the right to seek clarifications from any vendor throughout the evaluation process.

The Port reserves the right to require the vendor to submit evidence of qualifications as it may deem necessary. This evidence may concern financial, technical or other qualifications.

AWARD AND AGREEMENT EXECUTION INSTRUCTIONS

The Port intends to provide written notice of intent to award in a timely manner. The apparent successful Vendor will receive notification from the Port after the award decision is made, including instructions for final submittals due prior to execution of the Agreement.

The Port may negotiate elements of the proposal as required to best meet the needs of the Port, with the apparent successful vendor. The Port may negotiate any aspect of the proposal or the solicitation. If the Port is unable, as solely determined by the Port, to negotiate the terms of an agreement with the apparent successful vendor, negotiations will be formally terminated and the Port will select the next ranked firm(s) until an agreement is reached or the process is terminated.