



BAY AREA
AIR QUALITY
MANAGEMENT
DISTRICT

Centralized Records Management System

Request for Proposals

Pre-bidder's Conference

May 10, 2017

9:00 am

Magen Holloway, Acting Manager
Records Management Section



Overview

- **Background**
- **Purpose**
- **Software Requirements**
- **Request for Proposal (RFP)**
- **Submitting Bids**
- **Schedule/Next Steps**
- **Q & A**

A photograph of the San Francisco skyline at night, with the city lights reflecting on the water. The image is used as a background for the title.

Bay Area Air Quality Management District

Background

- Created in 1955 as the first regional agency to deal with air pollution in California
- 9 County jurisdiction
- Approximately 400 employees
- 11 departments
- Records Retention Schedule revised in 2015

Centralized Records Management System (CRMS)

- Record Retention Schedule revised in 2015
- Create one system to track and maintain records

Software Requirements

- Secure, searchable, and auditable repository
- Retain new records
- Retain electronic records migrated from other systems
- Track paper records

Attachment A

- Section 1- Implementation and Consulting Services
- Section 2- Functional Requirements
- Section 3- Technical Requirements
- Section 4- Vendor Requirements
- Section 5- Pricing



Implementation

Implementation and Consulting Services

- Consulting Services
 - CRMS implementation services
 - File plan and taxonomy
 - Training
 - Team structure
 - Air District level of Involvement
- Project plan



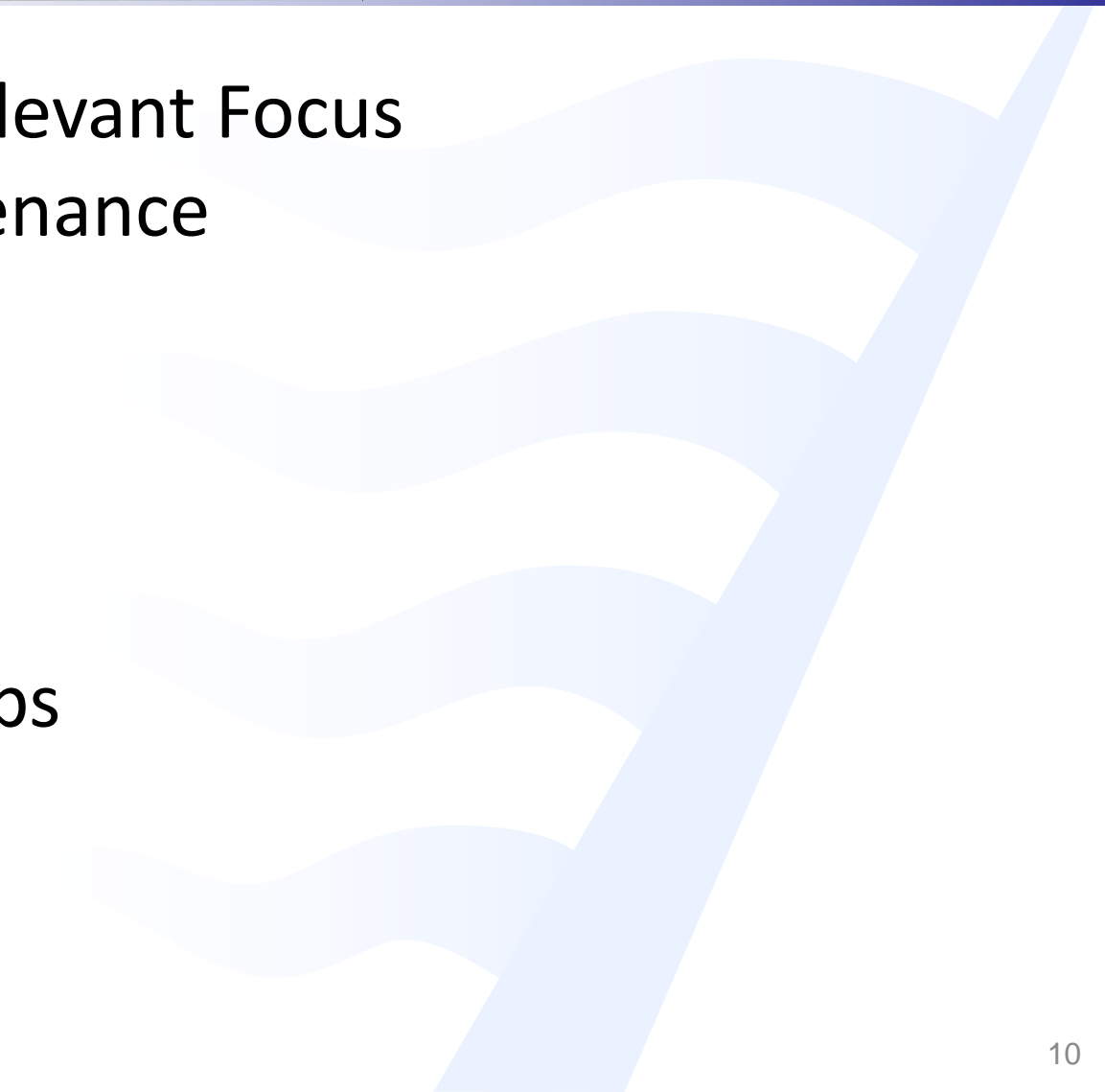
Functional Requirements

- Software vendor
- Record capture
- Declaration and Classification
- Maintenance and User capabilities
- Retention and Disposition
- Hold and Release
- Physical Records Management
- Records Auditing and Reporting



Technical Requirements

- Security and Access Control
- Integration
- Scalability, Reliability and Performance
- Development
- Administration and Reporting

- Stability and Relevant Focus
 - Solution Maintenance
 - Support
 - Technical
 - Software
 - Training
 - User groups
- 



Pricing

- Software
- Implementation Services
- Documentation and Training



Submitting Bids

Request for Proposal # 2017-004

RFP is located on BAAQMD website

Complete questions in Attachment A

Hard copy **and** electronic copy to czhang@baaqmd.gov

Proposals received by May 25, 2017



Schedule / Next Steps

| Milestone | Date |
|----------------------------------|---------------|
| RFP Release Date | April 24 |
| Pre-Bidder's Conference | May 10 |
| Questions Due Date | May 10 at 4PM |
| Answers Provided via Website | May 11 |
| RFP Submission Due Date | May 25 |
| RFP Evaluations Complete | June 7 |
| Interviews with Finalist Vendors | June 14 |
| Selection of Finalist | June 21 |



Questions and Answers

- Turn in Question Cards before leaving or email czhang@baaqmd.gov
- Responses will be posted at www.baaqmd.gov/ May 11 by 6:00 PM