

GOVERNMENTAL ENTITY RESPONSIBILITIES

A Governmental unit desiring to purchase a new EDMS, replace an existing purchased or hosted EDMS must work with the selected Contractor to develop a Statement of Work defining the work to be accomplished by the Contractor. The following guideline is provided as an aid in developing the Statement of Work and may not include all items that need to be defined in a Governmental entity's Statement of Work. Additional definitions, definitions that are Governmental entity specific, and/or descriptions of work to be performed that are not provided in this RFP will need to be provided in the Governmental entity's Statement of Work. Some items the Governmental entity's Statement of Work should include, but are not limited to:

- Relevant background information about the Governmental entity, the Governmental entity's mission, a description of the project, and a clear link between the Agency's operational goals and the project
- A definition of the problem or purpose within its environmental context
- A description of the current business and technical environment
- A description of any existing workflows and metadata familiar to the Governmental entity's environment
- Completion of the General Imaging Statistics Sheet - Appendix B and Scale (size of images and expandability) identifying volumes of data to be scanned and/or imaged
- The goals of the project
 The goals of the project may include improving the organizations ability to carry out its mission. Such as improve customer service, reduce manual record keeping, speed up transactions, increase revenue, prevent errors, etc.
- Any time constraints or deadlines for completing the project
- Any unique technical, programmatic, or conditions associated with the project such as federal requirements
- The Project Manager(s) name(s), number(s), and their associated PMI numbers
- The selected Contractor's needs assessment and proposal.
- The Contractor staff, roles, and responsibilities
- The State staff, roles, and responsibilities
- The Governmental entity's retention and Inventory Tracking Schedules
- The Identification of any Confidential Data

The Statement of Work cannot modify the contractual requirements contained in this contract, but should work in unison with the terms and conditions and the contractor's proposal to form the contract.

Additional aids for the Governmental entity in developing the Agency's Statement of Work, or additional ideas to consider may be referenced on the ITMO website under "State Term Contracts" at <http://cio.state.sc.us/itmo/contract/itsclist.htm> at a future date.

NEEDS ASSESSMENT FOR GOVERNMENTAL ENTITIES

Any Governmental entity desiring to either purchase an EDMS or a hosted EDMS will be **required** to have a needs assessment conducted by qualified Contractor(s) from either Lots 1 or 2 on EDMS State Term Contract that are suited to meet the Governmental entities' particular volume needs. Each Contractor within the selected Lot will be contacted by the inquiring Government entity and asked to submit a proposal for a needs assessment including a firm-fixed price. The needs assessment should include, but is not limited to, anything related to the electronic document management processes. After review of the submitted needs assessments proposals, the Governmental entity will select a Contractor to perform the needs assessment.

Upon completion of the Needs Assessment, the Contractor will prepare a proposal for the implementation of the EDMS to include a Detailed Design, Draft User Manual(s), and Draft Test Plan(s). The performance objectives must include the necessary steps, tasks, timeline, resource requirements, any necessary test plans, associated costs, and payment milestones for the completion of these deliverables. The Governmental entity may, at the end of this phase, accept the Contractor's proposal, negotiate changes in the Contractor's proposal, or terminate the contractual relationship with the Contractor. If the Governmental entity elects to continue its relationship with the Contractor, the Contractor's proposal with any negotiated changes and the governmental entity's written acceptance constitute an amendment to the contract. However, if the Governmental entity elects to terminate its relationship with the Contractor, the Governmental entity will pay the Contractor for the needs assessment, and the needs assessment(s) and material obtained during the needs assessment will become the property of the State and may be used in negotiating with another State Term Contractor qualified to meet the Governmental entity's needs. The Governmental entity may continue to have needs assessments performed by the Contractors of the selected Lot until they identify one that proves most advantageous to that government entity's particular needs. All Governmental entities will be responsible for sending a copy of the selected contractors needs assessment and proposal to the Information Technology Management Office (ITMO).

If the Governmental unit has a current installed base, a needs assessment may be waived and the purchasing Governmental entity may choose to employ either of the following options:

- continue purchasing services through the existing Contractor if the Contractor should appear on EDMS state term contract or;
- If the Governmental entity elects not to continue with their installed-base Contractor who is on the EDMS State Term Contractor, the Agency may invite any of the other Contractors on the EDMS State Term contract to propose a replacement EDMS.

If the Governmental unit should exercise the option to use a Contractor that provides: off-site records and data storage, and/or records destruction services, the governmental unit should have some type of inventory tracking system in place to identify all documents sent and returned from Contractor. Procedures should also be in place to ensure all records returned are returned in their original condition. Governmental entities should work with selected Contractor to establish these procedures.

PURCHASE OF HARDWARE/SOFTWARE

The purchasing Governmental entity reserves the right to purchase hardware and software needed for the EDMS Services from the EDMS Contractor, or using state term contract(s). Existing client hardware/software should be used wherever feasible and is desirable to the extent that it properly integrates with the proposed solution. If new hardware (ie. Scan workstations) is necessary, details and pricing information should be included in the Offeror's Business Proposal.

OPEN SYSTEMS APPROACH

The proposed software products and services should be consistent with the State's commitment to open architecture through the selection of software compliant with industry standard recommendations for connectivity, application program interfaces, graphical presentation and SQL-compliant database access. While proprietary software will be considered, products and services should export data in a common file format that allows for the exchange, sharing and utilization of such data across other agencies and State systems.