City of Minneapolis
Information Technology Department

Oracle Universal Records Management (URM)Services

Issue Date:
Friday, February 24, 2012

Proposals Due: Friday, March 9, 2012
4:30 pm, CST

1. OPENING STATEMENT

Information technology related services for City projects are provided to the City by its Information Technology (IT) Department. However, on occasion the City uses outside, private firms to assist IT and its staff to augment services for the City.

The City of Minneapolis is seeking services for the design and implementation of an Oracle Universal Records Management (URM) solution. Experience in URM is required and experience in all of the Scope of Services listed below is preferred.

2. GENERAL INFORMATION AND BACKGROUND

The City reserves the right to negotiate simultaneously with any number of firms or individuals as the City deems to be in its best interests. In responding to this Proposal, it is understood by all proposers that the City reserves the right to select none, any, or all proposers, which the City deems to be in its best interest.

This engagement is estimated to be full time on site for up to twelve months. Flexible office hours with daily exposure to computers.

3. SCOPE OF SERVICES

The Scope of Services has been separated into three phases:

A. Phase I - Implement Universal Records Management and migrate physical records.

1) Define strategy for implementing a comprehensive physical and electronic records management program.
2) Work closely with City Records Manager to review/consolidate the City's retention policy categories (nearly 1000) and determine a record retention schedule for implementation into URM.
3) Mentor and assist City of Minneapolis application analysts with Oracle URM implementation.
4) Assist City Records Manager(s) in creating a training template for training departmental records managers in the use of URM.
5) Use best practices to plan an efficient URM implementation, including physical and electronic records, metadata model, workflow, and retention rules.
6) Define processes for implementing physical and electronic records management.
7) Migrate approximately75,000 physical records from "Stellent Fixed Records Management" to Oracle URM.
8) Document the setup and configuration of URM.
9) Identify and track technical tasks.

B. Phase II - Implement Records Management Retention for electronic records within ECMS

1) Implement rules to initiate the disposition and destruction process within ECMS.
2) Develop Citywide Records Management Program.
3) Coordinate and educate Citywide records managers on the program and processes.
4) Evaluate all content collections and validate retention policies or modify/add metadata.
5) Identify and track technical tasks.

C. Phase III – Apply Records Management to non ECMS managed content

1) Define process to control retention of content residing on shared business drives, home drives, cd's, flash drives.
2) Identify content to be migrated to ECMS.
3) Migrate and apply retention to non-managed content as applicable.
4) Identify and track technical tasks.

4. PROPOSAL PROCESS

A. Timeline

The anticipated timeframe for this Proposal is as follows:

1) Release on Friday, February 24, 2012.
2) **Proposal is due Friday, March 9, 2012, 4:30 pm CST.**

B. Due Date

Email submittals to Barbara.Malinski@MinneapolisMN.gov by 4:30 pm CST, Friday, March 9, 2012.

Late submittals may not be accepted. It is not the City's responsibility, nor practice, to acknowledge receipt of any submittals as a result of this process. In the unlikely event that the candidate has been submitted by another company, the first submittal will be selected.

C) Format and Submittal

The proposal should set forth full and accurate information as required by this document.

Limit each proposal to a maximum of ten (10) pages as follows:
Up to two (2) pages for company and/or resource overview
Up to six (6) pages for all resumes of resources submitted
One (1) page for references
One (1) page for the Evaluation Criteria (Refer to #7)

5. DEPARTMENT CONTACT

The office soliciting this Proposal is the Information Technology (IT) Department. Barb Malinski shall be designated as the department contact person and is the only individual who can be contacted about the project prior to Friday, March 9, 2012.

The department contact person cannot vary the terms of the Proposal. Direct all questions and inquiries regarding this Proposal to Barbara.Malinski@MinneapolisMN.gov.

6. BILLING RATE INFORMATION

Include the Billing Rate Information below in your email cover page, not in the proposal itself.

Provide the resource(s) estimated number of hours and rate (fixed price or hourly rate):

Phase	Resource	Estimated Number of Hours	Rate (Indicate Either Fixed Price or Hourly)
I			
II			
III			

Also include company contact information.

The City will determine which proposal best meets the Scope of Services with its decision being final. The City may enter into negotiations with finalists prior to contract award. Passing the criminal background check of the Minneapolis Police Department may be required.

7. EVALUATION CRITERIA

Please note evaluation criteria being used to review your qualifications. Make sure they are addressed in your submittal.

An evaluation committee will be established consisting of various members of the City. The committee will review proposals using the following criteria as guides to determine which, if any, proposals are the most advantageous to the City's needs. Based on this evaluation, the City will select the proposal that best fits the City's needs.

Criteria for Awarding Scope	Answer	Provide Specific Details
Experience with Oracle URM implementations	Yes No	
Experience with integration of multiple Oracle ECMS systems with URM.	Yes No	
Experience with integration of URM with business application systems.	Yes No	
Ability for the company's resources to work on-site if necessary.	Yes No	
Experience creating user training documentation.	Yes No	
Experience with URM implementation project management and resources coordination.	Yes No	