



SOLICITATION NUMBER: CH-RFP-26-P-04

REQUEST FOR PROPOSAL

FOR

DOCUMENT DIGITIZATION SERVICES

BY

COUNTY HOUSING

8865 NATURAL BRIDGE

ST. LOUIS, MO 63121

PROPOSALS ARE DUE TO THE ADDRESS OR EMAIL SHOWN BELOW NO LATER THAN:

12 October 2026/ 2 PM Central Standard Time

MAILING ADDRESS

COUNTY HOUSING

ATTN: PURCHASING DEPARTMENT

8865 NATURAL BRIDGE ST. LOUIS, MO. 63121

IN-PERSON DELIVERY

GRAY DROP BOX ON THE FRONT OF THE PARKING LOT

ELECTRONIC DELIVERY

EMAIL: purchase@countyhousing.org

THE RESPONSIBILITY FOR SUBMITTING A RESPONSE TO THIS RFP AT THE OFFICES OF THE COUNTY HOUSING (COUNTY HOUSING) ON OR BEFORE THE STATED TIME AND DATE WILL BE SOLELY AND STRICTLY THE RESPONSIBILITY OF THE OFFEROR. COUNTY HOUSING WILL IN NO WAY BE RESPONSIBLE FOR ANY DELAYS CAUSED BY THE UNITED STATES POSTAL SERVICE, PRIVATE COURIER, EXPRESS SERVICE, OR CAUSED BY ANY OTHER OCCURRENCE.

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Introduction

COUNTY HOUSING is using the competitive proposal method to request quotes from qualified vendors to provide services to support COUNTY HOUSING's Document Digitalization project.

1. COUNTY HOUSING Reservations of Rights

COUNTY HOUSING reserves the right to:

- (a) **Right to Reject, Waive, or Terminate the RFP.** Reject any or all proposals, to waive any informality in the RFP process, or to terminate the RFP process at any time, if deemed by the Agency to be in its best interests.
- (b) **Right to Not Award.** Not award a contract pursuant to this RFP.
- (c) **Right to Terminate.** Terminate a contract awarded pursuant to this RFP, at any time for its convenience upon 10 days written notice to the Contractor(s).
- (d) **Right to Determine Time and Location.** Determine the days, hours, and locations that the successful proposer (hereinafter, "Contractor") shall provide the services called for in this RFP.
- (e) **Right to Retain Proposals.** Retain all proposals submitted and not permit withdrawal for a period of 60 days after the deadline for receiving proposals without the written consent of COUNTY HOUSING Planning and Procurement Officer.
- (f) **Right to Negotiate.** Negotiate the fees proposed by the proposer entity.
- (g) **Right to Reject Any Proposal.** Reject and not consider any proposal or proposer that does not meet the requirements of this RFP, including but not necessarily limited to incomplete proposals and/or proposers offering alternate or non-requested services.
- (h) **No Obligation to Compensate.** Have no obligation to compensate any proposer for any costs incurred in responding to this RFP.
- (i) **Right to Prohibit.** At any time during the RFP or contract process, prohibit any further participation by a proposer or reject any proposal submitted that does not conform to any of the requirements detailed herein. By accessing and by obtaining this document, each prospective proposer is thereby agreeing to abide by all terms and conditions listed within this document, and further agrees that he/she will inform the Planning and Procurement Officer in writing within 5 days of the discovery of any item listed herein or of any item that is issued thereafter by COUNTY HOUSING that he/she feels needs to be addressed. Failure to abide by this timeframe shall relieve COUNTY HOUSING, but not the prospective or actual proposer, of any responsibility pertaining to such an issue.

2. Scope of Work

2.1 Project Overview

COUNTY HOUSING is seeking proposals from qualified firms to provide turnkey document digitization, electronic storage, and secure destruction services for approximately 3,000 boxes of records.

The selected Contractor shall provide all labor, materials, equipment, transportation, software, cloud hosting, supervision, project management, and other resources necessary to complete the project.

The project includes:

- Inventory and pickup of records
- Secure transportation
- Document preparation
- Scanning and OCR conversion
- Indexing and metadata capture
- Quality assurance
- Secure cloud-based document repository
- User access and retrieval
- Secure destruction of paper records
- Project reporting and closeout

2.2 Estimated Volume

COUNTY HOUSING estimates:

- Approximately 3,000 banker boxes
- Approximately 2,100 boxes for scanning
- Approximately 900 boxes designated for destruction only

Actual quantities may vary.

COUNTY HOUSING encourages prospective proposers to visit the project location(s) to review the records and assess the estimated volume of documents prior to submitting a proposal. Vendors may inspect the records storage areas and view representative samples of the boxes and files to better understand the scope of work.

Site visits shall be scheduled in advance through COUNTY HOUSING's designated contact person (**Manish Kadaboina**). All site visits must be completed prior to the proposal due date. Vendors are responsible for obtaining any information necessary to prepare an

accurate and complete proposal. The estimated quantities provided in this solicitation are for planning purposes only and may vary.

2.3 Document Collection and Transportation

The Contractor shall:

- Pick up records from COUNTY HOUSING facilities
- Maintain documented chain of custody
- Track all boxes from pickup through destruction
- Provide inventory reports upon request
- All transportation costs shall be included in the proposal.

2.4 Scanning Requirements

The Contractor shall:

- Scan documents at a minimum of 300 DPI
- Create searchable PDF files
- Apply OCR technology
- Scan single-sided and double-sided documents
- Preserve original file order
- Capture all pages and images
- Maintain image quality suitable for long-term records retention

2.5 Indexing and Quality Control

The Contractor shall:

- Provide folder-level indexing at a minimum
- Capture metadata fields identified by COUNTY HOUSING
- Perform quality control reviews
- Correct scanning or indexing errors at no additional cost
- Minimum performance standards:
 - 99.5% image accuracy
 - 99% indexing accuracy
 - 98% OCR accuracy

2.6 Cloud Repository

The Contractor shall provide a secure cloud-based document repository that includes:

- Web-based access

- Searchable documents and metadata
- User permissions and role-based access
- Multi-factor authentication
- Audit logs
- Data encryption in transit and at rest
- Ability to view, download, and export records

2.7 Security and Compliance

The Contractor shall:

- Protect confidential information and personally identifiable information (PII)
- Conduct background checks on personnel assigned to the project
- Maintain secure facilities and data security controls
- Comply with applicable federal, state, local, and HUD requirements
- Maintain cyber liability insurance and general business insurance throughout the contract period.

2.8 Records Retention and Destruction

Paper records shall be retained by the Contractor until COUNTY HOUSING has completed quality assurance review and provided written authorization for destruction. In no event shall records be destroyed less than **sixty (60) days** after digitization and acceptance by COUNTY HOUSING. The Contractor shall comply with all applicable federal, state, local, and HUD record retention requirements.

The Contractor shall:

- Securely shred approved records
- Recycle shredded materials when possible
- Provide Certificates of Destruction
- Maintain destruction logs

2.9 Deliverables

The Contractor shall provide:

- Searchable PDF files
- OCR text layer
- Metadata/index files
- Cloud repository access
- Inventory reports
- Progress reports
- Certificate of Destruction

- Final project report
- Security and Compliance

2.10 Pricing Requirements

The proposal shall provide an all-inclusive price per image.

The per-image price shall include:

- Pickup and transportation
- Labor
- Document preparation
- Scanning
- OCR
- Indexing
- Quality control
- Project management
- Cloud storage and licensing
- User access
- Reporting
- Destruction services
- Certificates of Destruction
- All overhead, profit, and miscellaneous costs

The proposal shall also provide a separate per-box price for shred-only records.

No separate charges will be permitted for transportation, setup, OCR, indexing, project management, cloud hosting, user licenses, or destruction services.

2.11 Vendor Qualifications

The Contractor shall demonstrate:

- At least five (5) years of document digitization experience
- Experience with government, housing authority, healthcare, or regulated records
- Successful completion of similar large-scale scanning projects
- Capability to perform all services within the United States

3. Software, Equipment and Supplies

COUNTY HOUSING will not provide access to necessary systems, documentation, and training for the contractor to perform services.

4. Time of Performance/Contract Terms

COUNTY HOUSING anticipates that the digitization of approximately 2,100 boxes of records

and the destruction of approximately 900 boxes of records will be completed within **twelve (12) months** of the Notice to Proceed. Proposers may recommend an alternate schedule; however, the proposed timeline shall clearly identify the anticipated start date, completion date, and monthly production capacity.

Under no circumstances should work commence until a signed Contract and Notice to Proceed are in hand.

5. Compensation/Method of Payment

Invoices should be clearly marked with the “Contract Number” and detailed by addresses that were cut. County Housing may require contractors to provide certified payroll, to ensure the contractor is complying with the attached minimum wage requirements.

Billings will provide a description of work performed; number of hours worked, hourly billing rates and other expenses chargeable to the Contract. All invoices to be mailed to: Accounts Payable Office, COUNTY HOUSING, 8865 Natural Bridge Road, St. Louis, MO 63121. COUNTY HOUSING will determine satisfactory performance under the Contract.

6. Validation of Labor Charges. The Contractor shall maintain payroll records, invoices, timesheets, and other documentation necessary to support labor charges invoiced under this contract. Upon request, County Housing may review supporting documentation to verify labor costs billed under the contract.

7. Proposal Format

7.1 Tabbed Proposal Submittal. COUNTY HOUSING intends to retain a Contractor using the competitive proposal process pursuant to a “Best Value,” not a “Lowest Price” basis. “Best Value,” consider factors other than just price in making the award decision. Therefore, so that COUNTY HOUSING can properly evaluate the offers received, all proposals submitted in response to this RFP must be formatted in accordance with the sequence noted in the table below. Each category must be separated by numbered index dividers and labeled with the corresponding tab reference also noted below. None of the proposed services may conflict with any requirement COUNTY HOUSING has published herein or has issued by addendum.

Tab No.	Description
1	Form of Proposal. This Form is attached hereto as Attachment A to this RFP document. This form must be fully completed, executed where provided and submitted under this tab as a part of the proposal submittal.
2	HUD-5369-C (8/93), <i>Certifications and Representations of Offerors, Non-Construction Contract.</i> This Form is attached hereto as Attachment C to this RFP document. This form must be fully completed, executed where provided thereon and submitted under this tab as a part of the proposal submittal.
3	Profile of Firm Form. The Profile of Firm Form is attached hereto as Attachment D to this RFP document. This form must be fully completed, executed, and submitted under this tab as a part of the proposal submittal.
4	Proposed Services. As more fully detailed within SCOPE OF SERVICES , of this document, the proposer shall, at a minimum, clearly detail within the information submitted under this tab documentation showing:

	As detailed within Section PROPOSAL EVALUATION , Evaluation Factor No. 2, herein, the proposer's DEMONSTRATED UNDERSTANDING of COUNTY HOUSING'S REQUIREMENTS .
	As detailed within Section PROPOSAL EVALUATION , Evaluation Factor No. 3, herein, the QUALITY of the TECHNICAL APPROACH and the SERVICES PROPOSED .
	As detailed within Section PROPOSAL EVALUATION , Evaluation Factor No. 4, herein, the proposer's DEMONSTRATED TECHNICAL CAPABILITIES (in terms of personnel) and the MANAGEMENT PLAN (including the proposer's demonstrated standards of professionalism and customer care, follow-through on jobs, reports, accuracy, and how the proposer proposes to respond when "things go wrong").
	As detailed within Section PROPOSAL EVALUATION , Evaluation Factor No. 5, herein, the proposer's DEMONSTRATED EXPERIENCE in performing similar work and the proposer's DEMONSTRATED SUCCESSFUL PAST PERFORMANCE (including meeting costs, schedules, and performance requirements) of contract work substantially similar to that required by this solicitation as verified by reference checks or other means.
	If appropriate, how staff are retained, screened, trained, and monitored.
	The proposed quality assurance program.
	An explanation and copies of forms that will be used and reports that will be submitted and the method of submission of such reports (i.e., written; fax; Internet; etc.).
	A complete description of the products and services the firms provides.
5	Managerial Capacity/Financial Viability/Staffing Plan. The proposer entity must submit under this tab a concise description of its managerial and financial capacity to deliver the proposed services, including brief professional resumes for the persons identified within areas (5) and (6) of Attachment D, <i>Profile of Firm Form</i> . Such information shall include the proposer's qualifications to provide the services; a description of the background and current organization of the firm (including a current organizational chart).
6	Client Information. The proposer shall submit a listing of former or current clients (at least 3), including any other Public Housing County Housing, for whom the proposer has performed similar or like services to those being proposed herein.
7	Equal Employment Opportunity/Supplier Diversity. The proposer must submit under this tab a copy of its Equal Opportunity Employment Policy and a complete description of the positive steps it will take to ensure compliance, to the greatest extent feasible, with the regulations detailed within the following PROPOSAL SUBMISSION section herein pertaining to supplier diversity (i.e., small, minority-, and women-owned businesses).
8	Subcontractor/Joint Venture Information (Optional Item). The proposer shall identify hereunder whether or not he/she intends to use any subcontractors for this job, if awarded, and/or if the proposal is a joint venture with another firm. Please remember that all information required from the proposer under the preceding tabs must also be included for any major subcontractors (10% or more) or from any joint venture.

9	Other Information (Optional Item). The proposer may include hereunder any other general information that the proposer believes is appropriate to assist the Agency in its evaluation.
No Information Placed under a Tab. If no information is to be placed under any of the above noted tabs (especially the “Optional” tabs), please place there under a statement such as “NO INFORMATION IS BEING PLACED UNDER THIS TAB” or “THIS TAB LEFT INTENTIONALLY BLANK.” <u>DO NOT</u> eliminate any of the tabs.	
Proposal Submittal Binding Method. It is preferable and recommended that the proposer bind the proposal submittals in such a manner that the Agency can, if needed, remove the binding (i.e., “spiral-type” etc.) or remove the pages from the cover (i.e., 3-ring binder; etc.) to make copies, then conveniently return the proposal submittal to its original condition.	

Table 1 – Tabbed Proposal Outline

7.2 Entry of Proposed Fees

Proposers shall submit a complete fee schedule using the format below. All fees shall be fully inclusive and cover all labor, supervision, transportation, document preparation, scanning, OCR processing, indexing, quality control, project management, software, cloud hosting, storage, security requirements, reporting, destruction services, overhead, profit, and all other costs necessary to perform the services described in this solicitation.

The Proposal Fee Schedule shall include at a minimum:

Item	Unit of Measure
Document Scanning and Digitization Services	Per Image
Secure Destruction Services (Shred-Only Records)	Per Box/Image
Annual Cloud Storage and Licensing (if applicable)	Per Year
Optional Additional User Licenses (if applicable)	Per User
Optional Professional Services	Per Hour

Table 2 – Labor Categories and Level of Effort

7.2.1 Pricing Requirements

- The per-image price shall include all costs associated with document pickup, transportation, preparation, scanning, OCR, indexing, quality control, project management, repository access, storage, reporting, and other services required to complete the project.
- The per-box price for destruction-only records shall include pickup, transportation, secure destruction, recycling, and Certificates of Destruction.
- Any recurring fees, subscription fees, maintenance fees, storage fees, licensing fees, or other ongoing costs shall be clearly identified.
- No additional fees shall be charged unless specifically identified in the proposal and approved in writing by COUNTY HOUSING.
- COUNTY HOUSING reserves the right to request clarification of any pricing submitted and to reject proposals containing incomplete or ambiguous pricing.

Total Proposed Cost

Estimated Scanning Volume: _____ Images × \$_____ per image = \$_____

Estimated Destruction Volume: _____ Boxes × \$ _____ per box = \$ _____

Annual Cloud Storage/License Fees (if applicable): \$ _____

Total Proposed Cost: \$ _____

8. Submission Requirements

Proposals must be submitted and time-stamped received in the designated County Housing office by no later than the submittal deadline stated herein (or within any ensuing addendum). Electronic submissions must adhere to the same deadline stated, uploaded to the electronic transfer protocol referenced. A total of 1 original signature copy (marked ORIGINAL”) and 2 exact copies (each of the 3 separate proposal submittals shall have a cover and extending tabs) of the “hard copy” proposal submittal, shall be placed unfolded in a sealed package and addressed to:

COUNTY HOUSING
Attn: Manish Kadaboina, Procurement Officer
8865 Natural Bridge
St. Louis, MO 63121

The package exterior must clearly denote the above noted RFP number and must have the proposer’s name and return address. Proposals received after the published deadline will not be accepted.

DO NOT FOLD OR MAKE ANY ADDITIONAL MARKS, NOTATIONS, OR REQUIREMENTS ON THE DOCUMENTS TO BE SUBMITTED! Proposers are not allowed to change any requirements or forms contained herein, either by making or entering onto these documents or the documents submitted any revisions or additions; and if any such additional marks, notations or requirements are entered on any of the documents that are submitted to COUNTY HOUSING by the proposer, such may invalidate that proposal. If, after accepting such a proposal, COUNTY HOUSING decides that any such entry has not changed the intent of the proposal that COUNTY HOUSING intended to receive, COUNTY HOUSING may accept the proposal and the proposal shall be considered by COUNTY HOUSING as if those additional marks, notations, or requirements were not entered on such. By accessing and accepting these documents, each prospective proposer that does so is thereby agreeing to confirm all notices that the Agency delivers to him/her as instructed, and by submitting a proposal, the proposer is thereby agreeing to abide by all terms and conditions published herein and by addendum pertaining to this RFP.

It shall be the responsibility of each proposer to be aware of and to abide by all dates, times, conditions, requirements, and specifications set forth within all applicable documents issued by COUNTY HOUSING, including the RFP document, the documents listed within the following section herein, and any addenda and required attachments submitted by the proposer. By virtue of completing, signing, and submitting the completed documents, the proposer is stating his/her agreement to comply with all conditions and requirements set forth within those documents. Written notice from the proposer not authorized in writing by the Executive Director to exclude any of COUNTY HOUSING requirements contained within the documents may cause that proposer to not be considered for award.

It is the responsibility of the proposer to address all communication and correspondence pertaining to this RFP process to the Executive Director only. Proposers must not make inquiry or communicate with any other County Housing staff member or official (including members of the Board of Commissioners) pertaining to this RFP. Failure to abide by this requirement may be cause for COUNTY HOUSING to not consider a proposal submittal received from any proposer who may not have abided by this directive.

All interested contractors must have access to adequate financial resources to fully perform the contract.

Addenda. All questions and requests for information must be addressed in writing to the Executive Director. The Executive Director will respond to all such inquiries in writing by addendum to all prospective proposers (i.e., firms or individuals that have obtained the RFP Documents). During the RFP solicitation process, the Executive Director will NOT conduct any *ex parte* (a substantive conversation — “substantive” meaning, when decisions pertaining to the RFP are made—between COUNTY HOUSING and a prospective proposer when other prospective proposers are not present) conversations that may give one prospective proposer an advantage over other prospective proposers. This does not mean that prospective proposers may not call the Executive Director—it simply means that, other than making replies to direct the prospective proposer where his/her answer has already been issued within the solicitation documents, the Executive Director may not respond to the prospective proposer’s inquiries but will direct him/her to submit such inquiry in writing so that the Executive Director may more fairly respond to all prospective proposers in writing by addendum.

9. Proposer’s Responsibilities — Equal Employment Opportunity and Supplier Diversity

Be advised that contracts over \$200,000 trigger Section 3 of the Housing and Urban Development Act of 1968. Section 3 requires that economic opportunities generated by the expenditure of HUD funds be directed, to the greatest extent feasible, to low and moderate income persons via contracting, employment, and training. All contractors and subcontractors working on this project will need to demonstrate compliance with Section 3 numeric targets and other applicable provisions. In cases where Section 3 compliance is not achieved, contractors and subcontractors must document good-faith efforts to comply. See Attachment H – Section 3 Flyer Construction.

Within 2 CFR §200.321 it states:

Contracting with small and minority businesses, women’s business enterprises, and labor surplus area firms.

(a) The non-federal entity must take all necessary affirmative steps to assure that minority businesses, women’s business enterprises, and labor surplus area firms are used when possible.

(b) Affirmative steps must include:

(1) Placing qualified small and minority businesses and women’s business enterprises on solicitation lists.

(2) Assuring that small and minority businesses, and women’s business enterprises are solicited whenever they are potential sources.

(3) Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by small and minority business, and women’s business enterprises.

(4) Establishing delivery schedules, where the requirement permits, which encourage participation by small and minority business, and women’s business enterprises.

(5) Using the services and assistance, as appropriate, of such organizations as the Small Business Administration and the Minority Business Development Agency of the Department of Commerce; and

(6) Requiring the prime contractor, if subcontracts are to be let, to take the affirmative steps listed in paragraphs (1) through (5) of this section.

Within HUD Procurement Handbook 7460.8 REV 2 it states:

- (a) Section 15.5.A, Required Efforts. Consistent with Presidential Orders 11625, 12138, and 12432, the [Agency] shall make every effort to ensure that small businesses, MBEs, WBEs, and labor surplus area businesses participate in [Agency] contracting.
- (b) Section 15.5.B, Goals. [The Agency] is encouraged to establish goals by which they can measure the effectiveness of their efforts in implementing programs in support of contracting with disadvantaged firms. It is important to ensure that the means used to establish these goals do not have the effect of limiting competition and should not be used as mandatory set-aside or quota, except as may otherwise be expressly authorized in regulation or statute. Some localities have adopted minority contracting set-aside policies or geographic limitations, which may be in conflict with Federal requirements for full and open competition.

Within the COUNTY HOUSING Procurement Policy, it states the following:

Assistance to Small and Other Business, Required Efforts:

Consistent with Presidential Executive Orders 11625, 12138, and 12432, and Section 3 of the HUD Act of 1968, all reasonable efforts will be made to ensure that COUNTY HOUSING contracts with small businesses, minority business enterprises (MBE), women's business enterprises (WBE), and businesses located in or owned in substantial part by persons residing in COUNTY HOUSING projects when possible. Such efforts will include, but will not be limited to:

- (1) Including such firms, when qualified, on solicitation mailing lists.
- (2) Encouraging participation through direct solicitation of bids or proposals whenever they are potential contractors.
- (3) Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by such businesses.
- (4) Establishing delivery schedules, where the requirements permit, to encourage participation by such businesses.
- (5) Using the services and assistance of the Small Business Administration and the Minority Business Development Agency of the Department of Commerce.
- (6) Including in contracts, to the greatest extent feasible, a clause requiring contractors to provide opportunities for training and employment for lower income residents of the project area and to award subcontracts for work in connection with the project to businesses providing opportunities to low-income residents.
- (7) Requiring prime contractors, when subcontracting is anticipated, to take the actions listed above.

Requirements. Accordingly, please see Tab7 within Table No. 1 herein which details the information pertaining to this issue that the proposer must submit in response to this proposal showing compliance, to the greatest extent feasible, with these regulations.

Pre-proposal Conference. There is not a pre-proposal conference scheduled as a part of this RFP.

10. Evaluation Factors

Objective/Subjective Evaluation Factors. The following factors will be utilized by the Agency to evaluate each proposal submittal received; award of points for each listed factor will be based upon the documentation that the proposer submits within his/her proposal submittal and on-line

(specifically, the pricing submitted on-line):

(1) No.	(2) Max Point Value	(3) Factor Type	(4) Factor Description
1	20 points	Objective	The PROPOSED COSTS submitted by the proposer, including the all-inclusive per-image pricing, cloud storage costs, destruction costs, and any optional services.
2	10 points	Subjective (Technical)	The proposer's DEMONSTRATED UNDERSTANDING OF COUNTY HOUSING's REQUIREMENTS for document digitization, cloud records management, records retention, and secure destruction services.
3	10 points	Subjective (Technical)	The QUALITY OF THE TECHNICAL APPROACH AND SERVICES PROPOSED , including document preparation, scanning methodology, OCR capabilities, indexing methodology, quality control measures, security practices, and cloud-based document access solution.
4	20 points	Subjective (Technical)	The proposer's DEMONSTRATED TECHNICAL CAPABILITIES AND PROJECT MANAGEMENT PLAN , including staffing, project schedule, chain-of-custody procedures, customer support, reporting capabilities, data security controls, and ability to successfully complete the project within the proposed timeframe.
5	30 points	Subjective (Technical)	The proposer's DEMONSTRATED RELEVANT EXPERIENCE AND PAST PERFORMANCE in providing document digitization, records management, cloud storage, and secure destruction services for public agencies, housing authorities, governmental entities, or similarly regulated organizations. Consideration will be given to references, project size, performance history, and successful completion of comparable projects.
6	10 points	Subjective (Technical)	The OVERALL QUALITY, ORGANIZATION, COMPLETENESS, AND PROFESSIONAL APPEARANCE OF THE PROPOSAL SUBMITTED , including responsiveness to the RFP requirements and clarity of the information provided.
	100 points		Total Points
*NOTE: Points will be awarded for each Subjective Factor by each of the appointed evaluation committee members based on his/her opinion after a thorough review of the information submitted by each proposer within his/her proposal.			

Table 3 – Evaluation Criteria

Evaluation Method. The eventual award will occur based on the following detailed brief procedures. Each proposal received will first be evaluated for responsiveness (i.e., meets the minimum of the requirements).

Evaluation Packet. An evaluation packet will be prepared for each evaluator, typically including the following documents:

- Instructions to Evaluators
- Proposal Tabulation Form
- Written Narrative Form for each proposer
- Recap of each proposer’s responsiveness
- Copy of all pertinent RFP documents

Evaluation Committee. COUNTY HOUSING anticipates that it will select a minimum of a three-person committee to evaluate each of the responsive “hard copy” proposals submitted in response to this RFP. PLEASE NOTE: No proposer shall be informed at any time during or after the RFP process as to the identity of any evaluation committee member. If, by chance, a proposer does become aware of the identity of such person(s), he/she SHALL NOT make any attempt to contact or discuss with such person anything related to this RFP. The Planning and Procurement Officer is the only person at COUNTY HOUSING that the proposers shall contact pertaining to this RFP. Failure to abide by this requirement may (and most likely will) cause such proposer(s) to be eliminated from consideration for award.

The Planning and Procurement Officer will evaluate and award points pertaining to Evaluation Factors No. 1 (the “Objective” Factor). The appointed evaluation committee, independent of the Planning and Procurement Officer or any other person at COUNTY HOUSING, shall evaluate the responsive proposals submitted and award points pertaining to Evaluation Factors No. 2 through No. 6 (the “Subjective” Factors). Upon final completion of the proposal evaluation process, the evaluation committee will forward the completed evaluations to the Planning and Procurement Officer.

Points Awarded Range. Pertaining to the Subjective Factors, please note the following range of points awarded (points pertaining to this RFP are shaded—please also see the Evaluation Factors detailed within the preceding section:

Points Awarded Range						
Classification*	Rating	%	10	20	30	100**
Acceptable	Excellent	95%/+	10	19-20	29-30	95-100
Acceptable	Very Good	90%/+	9	18	28	90-94
Potentially Acceptable	Good	80%/+	8	16-17	26-27	80-89
Potentially Acceptable	Average	70%/+	7	14-15	24-25	70-79
Unacceptable	Poor	<70%	0-6	0-13	0-23	0-69
*Pursuant to Section 7.2.N.3 of HUD Procurement Handbook 7460.8 REV 2.						
**Total available points to be awarded, including cost points, minus preference points.						

Table 4 – Points Award Range

Potential "Competitive Range" or “Best and Finals” Negotiations. COUNTY HOUSING reserves the right to, as detailed within Section 7.2.N through Section 7.2.R of HUD Procurement Handbook 7460.8 REV 2, conduct a “Best and Finals” Negotiation, which may include oral interviews, with all firms deemed to be in the competitive range. Any firm deemed not to be in the competitive range shall be notified of such in writing by the Agency in as timely a manner as possible, but in any case within no longer than 10 days after the beginning of such negotiations with the firms deemed to be in the competitive range.

Determination of Top-ranked Proposer. Typically, the subjective points awarded by the evaluation committee will be combined with the objective points awarded. If the evaluation was performed to the satisfaction of the Executive Director, the final rankings may be forwarded to the Housing County Housing Board of Commissioners at a scheduled meeting for approval. Contract negotiations may, at COUNTY HOUSING's option, be conducted prior to or after the Board of Commissioners approval.

- **Minimum Evaluation Results.** To be considered to receive an award a proposer must receive a total calculated average of at least 70 points (of the 100 total points detailed herein).
- **Ties.** In the case of a tie in points awarded, the award shall be decided as detailed within Section 6.12.C of HUD Procurement Handbook 7460.8 REV 2, by “drawing lots or other random means of selection.”

Notice of Results of Evaluation. If an award is completed, all proposers will receive by e-mail a Notice of Results of Evaluation. Such notice shall inform all proposers of:

- (a) Which proposer received the award.
- (b) Where each proposer placed in the process as a result of the evaluation of the proposals received.
- (c) The cost or financial offers received from each proposer.
- (d) Each proposer's right to a debriefing and to protest.

Restrictions: All persons having familial (including in-laws) and/or employment relationships (past or current) with principals and/or employees of a proposer entity will be excluded from participation on the Agency evaluation committee. Similarly, all persons having ownership interest in and/or contract with a proposer entity will be excluded from participation on the Agency evaluation committee.

11. Contract Award

Contract Award Procedure. If a contract is awarded pursuant to this RFP, the following detailed procedures will be followed:

- (a) By completing, executing, and submitting a proposal, the “proposer is thereby agreeing to abide by all terms and conditions pertaining to this RFP as issued by COUNTY HOUSING, either in hard copy or electronically, including the contract clauses already attached as Attachments F and F-1 through F-3, each attached hereto. Accordingly, COUNTY HOUSING has no responsibility to conduct after the submittal deadline any negotiations pertaining to the contract clauses already published.

Contract Conditions. The following provisions are considered mandatory conditions of any contract award made by COUNTY HOUSING pursuant to this RFP:

- (a) **Contract Form.** COUNTY HOUSING will not execute a contract on the Contractor's form—contracts will only be executed on COUNTY HOUSING form (please see Sample Contract, Attachments F and F-1 through F-3 each attached hereto), and by submitting a proposal the Contractor agrees to do so (please note that COUNTY HOUSING reserves the right to amend this form as COUNTY HOUSING deems necessary). However, COUNTY HOUSING will during the RFP process (prior to the posted question deadline) consider any contract clauses that the proposer wishes to include therein and submits in writing a request for the Agency to do so; but the failure of the Agency to include such clauses does not give the Contractor the right

to refuse to execute COUNTY HOUSING's contract form. It is the responsibility of each prospective proposer to notify COUNTY HOUSING, in writing, prior to submitting a proposal, of any contract clause that he/she is not willing to include in the final executed contract and abide by. COUNTY HOUSING will consider and respond to such written correspondence, and if the prospective proposer is not willing to abide by COUNTY HOUSING's response (decision), then that prospective proposer shall be deemed ineligible to submit a proposal.

- (b) **Mandatory HUD Forms.** Please note that COUNTY HOUSING has no legal right or ability to (and will not) at any time negotiate any clauses contained within ANY of the HUD forms included as a part of this RFP.
- (c) **Assignment of Personnel.** COUNTY HOUSING shall retain the right to demand and receive a change in personnel assigned to the work if COUNTY HOUSING believes that such change is in the best interest of COUNTY HOUSING and the completion of the contracted work.
- (d) **Unauthorized Sub-contracting Prohibited.** The Contractor shall not assign any right, nor delegate any duty for the work proposed pursuant to this RFP (including, but not limited to, selling or transferring the contract) without the prior written consent of the Planning and Procurement Officer. Any purported assignment of interest or delegation of duty, without the prior written consent of the Planning and Procurement Officer shall be void and may result in the cancellation of the contract with COUNTY HOUSING or may result in the full or partial forfeiture of funds paid to the Contractor because of the proposed contract; either as determined by the Planning and Procurement Officer.

Contract Period. COUNTY HOUSING anticipates a multi-year contract.

Licensing and Insurance Requirements. Prior to award (but not as a part of the proposal submission) the *Contractor* will be required to provide:

- (a) **Workers Compensation Insurance.** An original certificate evidencing the proposer's current industrial (worker's compensation) insurance carrier and coverage amount (NOTE: Workers Compensation Insurance will be required of any Contractor that has employees other than just the owner working on-site to provide the services).
- (b) **General Liability Insurance.** An original certificate evidencing General Liability coverage, naming the Agency as an additional insured, together with the appropriate endorsement to said policy reflecting the addition of the Agency as an additional insured under said policy (minimum of \$1,000,000 each occurrence, general aggregate minimum limit of \$1,000,000, together with damage to premises and fire damage of \$50,000 and medical expenses any one person of \$5,000), with a commercially reasonable deductible (i.e., "commercially reasonable," meaning not greater than 1% of the "general aggregate minimum" of the policy, with a maximum deductible amount of \$50,000).
- (c) **Professional Liability Insurance.** An original certificate showing the proposer's professional liability and/or "errors and omissions" coverage (minimum of \$1,000,000 each occurrence, general aggregate minimum limit of \$1,000,000), with a commercially reasonable deductible (i.e., "commercially reasonable," meaning not greater than 1% of the "general aggregate minimum" of the policy, with a maximum

deductible amount of \$50,000)

- (d) Automobile Insurance.** An original certificate showing the proposer's automobile insurance coverage in a combined single limit of \$1,000,000. For every vehicle utilized during the term of this program, when not owned by the entity, each vehicle must have evidence of automobile insurance coverage with limits of no less than \$100,000/\$300,000 and medical pay of \$5,000.
- (e) City/County/State Business License.** If applicable, a copy of the proposer's business license allowing that entity to provide such services within the City of Saint Louis, Saint Louis County, and/or the State of Missouri.
- (f) Certificates/Profile of Firm Form.** Pertaining to the aforementioned insurance certificates and licenses, each proposer is required to enter related information on the Profile of Firm Form (do not attach or submit copies of the insurance certificates or licenses within the proposal submittal—we will garner the necessary documents from the successful proposer prior to contract execution).

Note:

The COUNTY HOUSING will be named as an Additional Insured under the successful bidder's Comprehensive General Liability Policy, but only to the extent that COUNTY HOUSING is not protected by sovereign immunity under Missouri law. The Policy's Additional Insured provision must include the following language: "The inclusion of the COUNTY HOUSING as an Additional Insured under this Policy is not intended to act as, and does not constitute, a waiver of its sovereign immunity under Missouri law, or as a waiver of any related defense. This Policy provides the COUNTY HOUSING with no coverage for any potential liability or in any suit for damages that would be barred against it by the doctrine of sovereign immunity in the absence of this Policy." The Policy will also include a waiver of subrogation in favor of the COUNTY HOUSING.

The Contractor shall be required to raise the limits of liability on a per occurrence basis, to match the revised statutory limit of the liability for public entities, during the term of this contract.

Right to Negotiate Final Fees. COUNTY HOUSING shall retain the right to negotiate the amount of fees that are paid to the Contractor, meaning the fees proposed by the top-rated proposer may, at COUNTY HOUSING's options, be the basis for the beginning of negotiations. Such negotiations shall begin after COUNTY HOUSING has chosen a top-rated proposer. Pertaining to these negotiations, please see the preceding Section herein.

Contract Service Standards. All work performed pursuant to this RFP must conform and comply with all applicable local, state, and federal codes, statutes, laws, and regulations.

Prompt Return of Contract Documents. All documents required to complete the contract, including contract signature by the successful proposers, shall be provided to COUNTY HOUSING within 10 workdays of notification by COUNTY HOUSING.

12. Mandatory Forms/Contract Provisions

The following table contains a list of attachments and mandatory forms that must be returned with your proposal response.

Description
Attachment A (Form of Proposal) (Must be returned with proposal)

Attachment B (HUD 5369-B)
Attachment C (HUD 5369-C) (Must be returned with proposal)
Attachment D (Profile of Firm Form) (Must be returned with proposal)
Attachment E (Section 3 Explanation)
Attachment F Sample Contract
Attachment F-1 (HUD 5370-C)
Attachment F-2 (HUD 50071)
Attachment F-3 (SF-LLL)
Attachment G Proposal Calendar
Attachment H Supplemental Instructions to Proposers & Contractors (SIPC)

Table 5 – List of Attachment