

Request for Quote (RFQ) for Records Management Support Services

Town of Bergen
10 Hunter Street
Bergen, NY 14416
585-494-1121

Overview

The Town of Bergen is located in Genesee County, conveniently near the NYS Thruway. With so many things to do and see, Bergen is a great place to visit and live. Our community is home to fertile agricultural lands and is experiencing a period of socioeconomic growth.

Currently, most of the Town's paper records are stored at three sperate locations: 10 Hunter Street, 13 South Lake Street and 15 South Lake Street. Although the total amount of storage space available within the buildings are currently adequate and sometimes environmentally appropriate, records management protocols and practices lack standardization, consistency, and coordination, and are ineffective and in need of review and improvement. This includes lack of standard inventory process, labeling, and storage protocols in order to make finding specific documents easier as well as more quickly accomplished.

The Town Clerk's Office has the responsibility of maintaining all important records for the Town. Previously, the Town did not keep an inventory or accurate records for any department within the Town. (Clerk, Historian, Court, Supervisor, Building and Assessor) Records are stored throughout the building and in a separate building that houses the historian. Most records have not been effectively managed by those departments. The records need to be organized and relocated to a file room. The Town needs to have a comprehensive inventory performed of all these records, in addition to Bergen's active records, in order to bring all files (active and inactive) into compliance with standards expressed in NYS Archives Records Retention and Disposition (hereinafter referred to as "LGS-1"). There are multiple boxes of records stored at various locations in the Town Hall that encompass financial, legal, assessment, grant, system maps, contracts, billing history, and the like that Bergen has not been able to obtain, sort, distribute, and file per the current LGSI-1 schedule. The Town needs to bring all Town records, both active and inactive, into an organized, indexed, and sustainable way. We also need to establish and implement proper records management indexing policies and procedures.

Work Plan

The primary goals of this engagement are to provide the Town of Bergen with a comprehensive inventory and organization of inactive and active paper records that are under its control, including both existing records and current records. The intent is hire a firm to identify document-specific retention requirements for these records, index them accordingly, and develop a comprehensive Records Management Plan to include proper policy and procedures, ensuring that the Town can maintain compliance with LGS-1 requirements in an efficient, timely, and cost-effective manner for all its records from this point forward. The policy should be easy to use in the future and include training for new employees so that records management procedures are followed in a consistent and sustained manner.

The expected Work Plan includes the following services:

1. Inventory, Review & Identification of Active and Inactive Paper Records
 - a) Review the Town's active and inactive paper record collection currently stored in the Town's three locations (Town Hall at 10 Hunter Street; Assessor/Building Office at 13 South Lake Ave. and Bergen Historian Office at 15 South Lake Ave.) in sour active records area as well as additional records stored throughout the buildings. See attached paper inventory.
 - b) Accurately identify relevant records to be moved to a future Town records storage area.
 - c) Determine required retention period for inventoried records per Schedule LGS-1.
 - d) Box retained records into standard 1 cubic feet records storage boxes. (Boxes will need to be provided by the contractor.)
 - e) Prepare a records inventory listing / floor plan that includes the following information:
 - Container locations / layout (e.g. building, room and shelf / fireproof cabinets)
 - Unique container identification number (e.g. by department)
 - Department-specific / type of record (e.g. map versus file)
 - General description of the box contents
 - Record series title & number.
 - Retention period
 - Date record is eligible for destruction.
 - f) Print box identification sheets and place them into plastic sleeves adhered to boxes. (Sleeves or labels will need to be provided by the contractor.)
 - g) Sort the inventory list per the following criteria:
 - Records available for disposal

- Permanent records
 - Records to be retained following the LGS-1 schedule.
 - Records needing further identification by Town personnel to determine disposition.
 - Records eligible for destruction
2. Development of a Records Management Plan, Policies and Procedures Designed to Ensure the Security, Retention, and Appropriate Disposition of all Records for which the Town is responsible.
- a) Provide an assessment of the Town's overall records management environment, including:
 - Identification of areas in need of improvement
 - Prioritization of areas of focus
 - b) Create a Records Management Plan to guide the Town in building its records management foundation for next 3-5 years.
 - c) Recommend policies and procedures to be established by the Town to use from this point forward.
3. Destruction of All Eligible Records after the Town has the opportunity to view the records.

Relationship of Parties

The Town of Bergen intends that any organization or individual selected to perform services described in this RFQ shall act as an independent contractor and shall have control of the work and the manner in which it is performed. Contractor will not to be considered an agent or employee of the Town of Bergen. The Contractor will provide their own staff if additional help is required to complete the project.

Payment

The Town audits and pays claims once a month, on the second Tuesday of the month. The contractor shall submit a claim five calendar days prior to the meeting for audit and payment.

Timeline

It is expected that Contractor will initiate the Work Plan described in this RFQ within a two-month time period upon execution of a contract and notice to proceed. It is anticipated that the project would be completed within a six-month period of time. If a Local Government Records Management Improvement Fund (LGRMIF) grant is received, work is expected to begin

January 2026 and should be completed by June 2026.

Contractor's Qualifications

Quotes submitted in response to the RFQ should be accompanied by information describing the prospective Contractor's qualifications, including:

- Scope and longevity of Contractor's operations
- Relevant experience
- Familiarity with New York State Archives standards and guidelines, and experience working within and utilizing the LGS-1 Schedule
- Relevant references

Submission

The contractor will complete the work in accordance with the Work Plan herein for the following prices. Pricing must be submitted on an hourly breakdown per the work plan.

Please Note:

The Town of Bergen is soliciting quotes from qualified vendors to utilize in potentially preparing and submitting an application for a Local Government Records Management Improvement Fund (LGRMIF) Grant in connection with its ongoing records management grants program. In implementing this scope of work, the vendor will follow all relevant New York State Archives' publications including but not limited to: Records Retention and Disposition Schedule LGS-1; State Archives Publication, Inventory and Planning; Guidelines for Storage of Inactive Government Records and Retention and Disposition of Records.

The Town reserves the right, in its sole discretion, to treat quotations submitted in response to this solicitation as equivalent to bids and to make an award to the lowest responsible bidder based on such quotes.

Quotes should be provided in accordance with the pertinent procedures set forth in General Municipal Law and the Town's procurement rules. Accordingly, the following forms must be completed and submitted along with the requested quote:

Questions should be directed to:

Ernie Haywood, Town Supervisor

Town of Bergen
10 Hunter Street
Bergen, NY 14416
585-494-1121
supervisor@bergenny.org

The Town of Bergen requests that all quotes be emailed to Ernie Haywood at supervisor@bergenny.org or presented in a plain sealed envelope marked **"Sealed Quote: Records Management Support Services."** Quotes are to be received no later than 4 pm on 3/12/2025.

The Town will provide access to the buildings and records to prospective bidder to view the records and current record storage areas upon request and availability of Ernie Haywood, Town Supervisor, up to the day before the bid due date.

The Town of Bergen reserves the right to reject any or all quotes received in response to this RFQ.

LGRMIF Paper Records Inventory

Record Series (Ex Highway, Building, Water/Sewer, etc.)	Location of Records	Boxes - # of boxes and size	File Cabinets - # of drawers and size	Rolled or Larger Sized Documents	Are all boxes/drawer s full?	Misc. Folders or Files not in boxes	General Condition of Records
Historian-	15 S Lake Road, Bergen NY 14416	88 boxes 12"X10"X16"	4 drawers lateral file 2'6" W	191 large documents	yes	200 binders and 100 books	OK
Town Clerk	10 Hunter Street Bergen NY 14416	26 boxes 16"X24 and 7 boxes	16 drawers 12"X26"	Maps- 40 large	yes	26 notebooks	OK
Court	10 Hunter Street Bergen NY 14416	107 boxes 15" X12"	10 drawers 12"X26"	none	yes	74 binders	OK
Assessor/Building Dept.	13 S.Lake Road Bergen NY 14416	5 boxes 12"X 10" X 16"	26 lateral file drawers 12"X36"	over 150 documents/pri nts	yes	47 notebooks	OK
Supervisor	10 Hunter Street Bergen NY 14416	13 boxes 12"X24"	8 Lateral file drawers 12"X26"	none	yes	N/A	OK
Town Clerk	10 Hunter Street Bergen NY 14416	21 - 16"X24" and 5 boxes 12"X15"	16 ,12"X 26" ,23,16"X2 6,11, 12"X	15 maps	yes	20 File Cabinets 16 drawers ,12"X 26" ,26 drawers ,16"X26,11 lateral drawers, 12"X 36"	