



**GARLAND INDEPENDENT SCHOOL DISTRICT
PURCHASING DEPARTMENT**

*501 S. Jupiter Rd
Garland, Texas 75042
972-487-3009*

March 28, 2023

**ADDENDUM 3, RFP #101-23-03
Scanning Services for Human Resources**

This addendum modifies the original document as listed below and is hereby incorporated to the contract documents. Acknowledge receipt of this addendum by returning the completed and signed form with the solicitation response. Failure to submit the addendum may be used as an evaluated factor.

ACTION:

The pricing table on page 22 has been changed. Lines 7-9 have been added.

FROM:

<u>Line Item 1</u>	Scanning Services Daily Rate (8 hours)	\$
<u>Line Item 2</u>	Scanning Services Half Day (4 hours)	\$
<u>Line Item 3</u>	Scanning Services Hourly Rate	\$
<u>Line Item 4</u>	Shredding Services Daily Rate (8 hours)	\$
<u>Line Item 5</u>	Shredding Services Half Day (4 hour)	\$
<u>Line Item 6</u>	Shredding Services Hourly Rate	\$

TO:

<u>Line Item 1</u>	Scanning Services Daily Rate	\$
<u>Line Item 2</u>	Scanning Services Half Day	\$
<u>Line Item 3</u>	Scanning Services Hourly Rate	\$
<u>Line Item 4</u>	Scanning Services per document Rate - estimated 481,000	\$
<u>Line Item 5</u>	Scanning Services Per Box – estimated 65 boxes	\$
<u>Line Item 6</u>	Scanning Services Hourly Rate	\$
<u>Line Item 7</u>	Shredding Services Daily Rate (8 hours)	\$
<u>Line Item 8</u>	Shredding Services Half Day (4 hours)	\$
<u>Line Item 9</u>	Shredding Services per Box Rate	\$

1. QUESTION:

Will the source documents be boxed and ready for pick-up by the selected vendor, or does the GISD expect the vendor to remove documents from current storage and box for transport to vendor location?

RESPONSE:

Yes, the documents are currently boxed and ready for pickup from the location. The vendor will be not be responsible for packing the documents prior pick up.

2. QUESTION:

Are all source documents currently housed in one location or multiple locations?

RESPONSE:

Two locations: Harris Hill (administration building) located at 501 S. Jupiter Rd. Garland, Texas 75042 & Pathfinder Achievement Center (PAC) located at 221 9th Street, Garland Texas, 75040.

3. QUESTION:

Will the GISD require the handling of (Image capture, Indexing, processing, etc.) to be within some physical limit/distance from the location of the source? As an example, will the GISD allow the vendor to process the source documents anywhere within the State of Texas?

RESPONSE:

The location must be close enough to retrieve a document within 24 hours. This can include hard copies or soft copies of the original document(s). Preference is within state lines, but we can consider an out-of-state vendor if they have mechanisms in place to scan copies of documents to us.

4. QUESTION:

The RFP document does not provide any technical specifications for the Image Capture at the page level. What is the ISD's expectations for Pixel Density and Pixel Depth?

RESPONSE:

High-quality pixel density between 95 & 110 ppi. pixel depth. Pixel depth: 1 bpp (black and white), 8 bpp (grayscale), 24 bpp (true color),

5. QUESTION:

The RFP document does not provide any technical specifications relating to the output or deliverables from the vendor. Does the GISD require Multi-page PDF files as the deliverable, or TIF files?

RESPONSE:

PDF format is preferred. PNG & JPG can be used if necessary.

6. QUESTION:

The RFP document does not provide any technical specifications relating to the Document Boundaries for each source document. Does the GISD expect each source file folder to become one Multi-page PDF or TIF?

RESPONSE:

Multipage PDF of PDF grouped by document description.

7. QUESTION:

Are there specific documents/pages within the source hard copy that needs to be segregated and scanned as a separate or specific deliverable?

RESPONSE:

Yes, we will provide a list of document categories for indexing See "Exhibit A" that includes the list of document types. It is not limited to the provided list.

8. QUESTION:

The RFP does not provide any indication as to how the scanned documents are to be indexed. Presuming that the documents are student records or possible transcripts, is it safe to assume that the scanned records would be indexed by Student Name (LN, FN, MI) and Student ID#?

RESPONSE:

Indexing are indexed by Employee name, Employee ID# and DOB

9. QUESTION:

The last bullet under RFP SOW section 2.5, implies an automatic capture and indexing. Without viewing and example of source records, it would be impossible to know if any automation processes can be applied. Will the GISD provide more detail regarding the current condition of the source records, index data to be gathered, and clarity as to the expectation of the deliverables?

RESPONSE:

Yes, additional information will be provided after the award is completed. Condition:

The documents are paper originals and copies of employee records as required by the GISD Board and TASB policy. Types:

1. Paper one sided
2. Paper 2 sided
3. Stabled paper pack
4. Dot Matrix Print Continuous Paper

Indexing categories:

1. Employee ID#
2. Employee name
3. Employee DOB
4. Date of document

Deliverables:

- b. Digital files with metadata assigned to each document.
 - i. Preferred: digital FTP server upload
 - ii. Accepted: Physical storage (e.g. external hard drives)
 - iii. Accepted: direct upload (confidentiality agreement required)

10. QUESTION:

There were multiple mentions in the RFP document, of the vendor expressing its experience using Laserfiche. Therefore, is the target system intended to host the scanned documents to be Laserfiche?

RESPONSE:

Yes, all documents are stored in Laserfiche repositories.

11. QUESTION:

Does the GISD intend that the Vendor handle the actual uploading of the scanned images into the ISD's Laserfiche platform?

RESPONSE:

That is one option. The other option (preferred) is a batch file with meta data assigned to each document group.

12. QUESTION:

With nearly all our customers, their IT departments will not allow us to upload or even log-in to their systems, because of security risks and/or potential liabilities. Therefore, we typically deliver a "Batch-Load" file, which can be used by the Laserfiche platform to automatically upload scanned records and associated Metadata into the platform. Therefore, is the GISD truly expecting the vendor to upload directly, or provide a Load-File for uploading?

RESPONSE:

A batch file is preferred. Limited access can be given to allow the vendor to prepare the batch file correctly.

13. QUESTION:

Typically, document conversion services are charged on a per unit basis. In this case, it appears that the GISD is asking for pricing based on an hourly rate. Requiring vendors to bid on an hourly rate may leave the GISD open to errors and/or cheating by some vendors. As an example, how would the GISD validate each and every hour being charged by the vendor, and the amount of work performed during each hour?

RESPONSE:

The vendor has the option to submit price by day, half day, hour or per document. Line #7 was added to the Pricing Table.

14. QUESTION:

Will the GISD consider changing the unit pricing to a "Per PDF Page Delivered?"

RESPONSE:

Yes, line #7 was added to the Pricing Table.

15. QUESTION:

Does the GISD have an existing Database, containing Student and Employee Name, and ID Number? And will the GISD be willing to provide the database to the selected vendor for increased accuracy and validation purposes?

RESPONSE:

Yes. We will provide staff rosters for indexing

16. QUESTION:

The pricing section requesting hourly rates is uncommon. Will the District instead consider pricing for work completed, such as price per each sheet scanned?

RESPONSE:

Line #7 was added to the Pricing Table.

17. QUESTION:

Can you estimate the image count to be digitized?

RESPONSE:

The majority of the files are PDS and letters. An estimated of 370 boxes that contain 65 files per box, and each file has 20 pages.

18. QUESTION:

Will records be indexed by name, date of birth and employee number?

RESPONSE:

All three are required for Laserfiche

19. QUESTION:

Is there a requirement to split each record into sections (Document type: Compensation, Reviews, etc.)?

RESPONSE:

Yes, we will provide a list with examples of each document type.

20. QUESTION:

Does the GISD require the deliverables to be Optical Character Recognition (OCR'D)?

RESPONSE:

Preferred, but not required. Laserfiche uses OCR when scanning to pick up employee name and EID#.

21. QUESTION:

Will the GISD allow us to view a sampling of the documents at the District Office, to determine the "Current Condition" of the target documents?

RESPONSE:

No vendor will not have access to preview the documents prior award completion. Employment documents as outlined by The Texas Association of School Boards (TASB): <https://www.tasb.org/>

Some examples:

- Absences & Leaves Forms
- ADA requests
- Employee Relations documents
- Employee applications
- Transcripts

Mayte R. Martinez
Mayte R. Martinez
Assistant Director of Purchasing

Company Name

Address

City State Zip

Signature

Title

Retention of Records

[Criminal History Records](#)

[Credentials](#)

[Transcripts](#)

[Service Records](#)

[Reasonable Assurance](#)

Retention Requirements

The Texas Local Government Records Act (Local Government Code, Title 6) governs the management and preservation of school district records. Records storage, retention, and destruction must comply with rules established by the Texas State Library and Archives Commission (TSLAC). Districts must appoint a records management officer (RMO) and establish a records management plan (Texas Local Government Code §203.021).

In addition, one of the following must be on file with the Texas State Library and Archives Commission:

- Local records management policy or plan, including a local records retention schedule that complies with the minimum retention periods
- Declaration of compliance indicating that the district has adopted records control schedules that comply with the minimum requirements established by the TSLAC

The district local records retention schedule must meet the minimum retention periods established by the TSLAC and should provide for the review, removal, and destruction of records whose retention periods have expired. The following state schedules applicable to school district records are available on the TSLAC Website (www.tsl.state.tx.us/slrm/recordspubs/localretention.html):

- Local Schedule GR—Schedule for Records Common to All Governments
- Local Schedule SD—Schedule for Records of Public School Districts

The retention requirements listed in these schedules incorporate the periods prescribed by federal and state law, rule, or regulation. An alphabetical list of the minimum retention periods of personnel records found in these schedules is available in the *HR Library* (see, [Sample Retention Schedule](#)). Districts can use this resource to ensure district practices comply with state minimum retention periods. The list can be modified to include district retention periods that meet administrative needs.

Criminal History Records

A district must destroy a criminal history record obtained from the Texas Department of Public Safety (DPS) on the earlier of the date the information is used for the authorized purpose or the first anniversary of the date the information was originally obtained (Tex. Gov't Code § 411.097(d)(3)). For example, if a district prints an applicant's criminal history, the district must destroy that document as soon as a decision is made as to whether to hire the applicant. If the district has not made a decision after one year, the district must destroy the criminal history at that time.

Similarly, a district must destroy information it collects in order to obtain a criminal history record—including the person's name, address, phone number, social security number, driver's license number, other identification number, and fingerprint records—not later than the first anniversary of the date the information is received (Tex. Educ. Code § 22.08391). This information is confidential and exempt from disclosure under the Public Information Act.

Credentials

Professional employees must provide districts with proof that they have the certification or license required for their assignment before their contract is binding (19 Texas Administrative Code (TAC) §230.531). Districts may retain the school district copy of teaching certificates in the personnel file during the employment period. These records are the property of the employee and must not be kept by the district when the employment relationship ends. When a teacher or administrator leaves the district, a copy should be made and the original returned to the employee.

Transcripts

An official transcript, on the other hand, is considered an official government record once surrendered to the district and must be retained according to the district's retention schedule. When an employee leaves the district, the original or a copy may be retained. Districts are not obligated to return original transcripts to employees when they leave the district but may choose to do so. A procedure should be established that specifies whether the original can be returned and the process employees must follow to request the official transcript when they leave the district.

Service Records

Rules governing the maintenance of service records are found in the 19 TAC §153.1021(d). Service records may be kept in hard copy or digitally using the form available from the Texas Education Agency (TEA) or one developed locally. Locally developed service records must include the following information:

- Sending district (digital only)
- Receiving district (digital only)
- Receiving educator (digital only)
- Employee's name
- TEA ID number/unique district ID for non-certified
- Employee signature
- School year
- State or country of district location
- County of district location or equivalent
- Name of school district
- Indication of public or private school
- Position held
- Years of experience
- Percent of school day employed
- Number of days employed during the contract year
- Indication if a full semester if less than 90 days
- Beginning and ending dates of employment for the contract year
- State sick leave information (year earned, amount earned and used, balance)
- State personal leave information (year earned, amount earned and used, balance)
- Authorized signature and title (e.g., superintendent)

The district is responsible for ensuring that service records are true and accurate and that all service recorded was actually performed. There is no requirement that the superintendent sign each service record or that it be notarized. Instead, the signature of a person designated by the district validates the service record.

Digital signatures on service records are acceptable. However, digital service records are only valid for the intended recipient as recorded on the service record. For example, a digital service record that includes information from previous employing districts that is sent directly to the employee's new district is considered an official service record. The digital service record will not be official if the recipient is the educator.

When an employee leaves the district, the original service record, verified by the employee shall be given to the employee upon request or sent to the next employing school district, and a copy kept on file. A scanned version of the original may be considered the official service record if it is sent directly from one employing district to another.

TEC § 21.4031 requires a district to deliver the service record not later than thirty days after the request is made or thirty days after the employee's last day of work, whichever is later. If a district fails to provide the service record, the employing district may request service data from TEA.

Reasonable Assurance Letter

The state minimum retention schedules do not address the retention period for reasonable assurance letters. The following retention periods apply:

- Letters of reasonable assurance must be retained for two years if no unemployment claim is filed.
- If an unemployment claim is filed, all documents relating to the claim must be retained for five years.

[Back to Top](#)

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