



REQUEST FOR PROPOSAL
for
Archival Database Services
to be provided to the
TOWN OF DALTON

August 27, 2026

This request for proposal consists of 32 pages. Please verify that you have a complete copy.

TABLE OF CONTENTS

CONTENTS

I. INTRODUCTION & OVERVIEW OF PROPOSAL SUBMISSION REQUIREMENTS	3
II. GENERAL INFORMATION	4
A. POINT OF CONTACT AND ISSUING OFFICE:.....	4
B. PROPOSAL PREPARATION COSTS	4
C. QUESTIONS	4
D. AMENDMENTS TO THIS REQUEST FOR PROPOSAL	5
E. QUALITY REQUIREMENTS	5
F. SOLICITATION PROCESS	6
G. CONDITIONS OF AWARD	6
H. PROPOSED SCHEDULE AND TARGET DATES:	7
I. ADDITIONAL INFORMATION	7
III. DALTON COMMUNITY PROFILE AND BACKGROUND	8
IV. PROPOSAL SCOPE.....	10
V. REQUESTED ADDITIONAL PROPOSAL INFORMATION	10
VI. PROPOSED PROJECT IMPLEMENTATION APPROACH	12
VII. PROPOSAL EVALUATION CRITERIA	13

ATTACHMENTS

ATTACHMENT A	CERTIFICATE OF NON-COLLUSION	17
ATTACHMENT B	PROPOSAL PRICING SHEET.....	19
ATTACHMENT C	INSURANCE REQUIREMENTS.....	20
ATTACHMENT D	APPLICABLE LEGAL REQUIREMENTS	22
ATTACHMENT E	EVALUATION WORKSHEET	23
ATTACHMENT F	SAMPLE AGREEMENT	25

Town of Dalton

Request for Proposals for

Town Database Services

I. Introduction & Overview of Proposal Submission Requirements

The Town of Dalton (“the Town”) is seeking to engage a qualified municipal database firm (“the Proposer”) to assist with meeting its cloud based searchable records goals through implementing a database solution that minimizes reliance on Dalton staff or IT personnel and provides high quality searches to Town residents accessed through the Town website as well as to Town staff.

Implementation of this project is contingent upon the Town receiving a State Compact IT Grant, which is not expected to be awarded until sometime after February 5, 2027. Respondents should structure their proposals recognizing that Dalton anticipates funding **annual software, hosting, support, and maintenance fees not to exceed \$12,000 and no more than approximately \$3,000 in additional one-time implementation costs** exclusive of the initial loading of existing documents and associated metadata generation. The costs associated with the initial loading of existing documents and metadata generation are expected to be funded through the IT Grant. If grant funding is less than requested, the Town will reduce the initial scope of work by decreasing the number of existing documents loaded during the initial implementation. Please also note that Massachusetts municipalities may not pay for goods or services before they are provided within the applicable fiscal year.

Proposers must demonstrate substantial qualifications, including:

- Extensive experience developing and maintaining municipal archival databases
- A history of implementations that have positively impacted municipal document management and workflows
- System approaches such as metadata that can limit reliance on Town management of directories
- A demonstrated ability to interface their database with municipal websites from which searches of the database can be initiated.

The Town reserves the right to solicit additional consulting services beyond the scope of this Request for Proposals (RFP) if it determines that doing so is in the Town’s best interest.

Proposals must be submitted in two (2) sealed envelopes:

- One envelope labeled **"Town Database Services – Technical Response"** shall include all required technical materials **without including any pricing information**.
- The second envelope labeled **"Town Database Services – Price Proposals"** shall contain only **Attachment B – Price Proposal Form**.

Proposers may correct, modify, or withdraw a proposal by submitting written notice to the Town prior to the proposal deadline. Any modifications must reference the original RFP and clearly indicate the specific sections of the proposal being revised.

All prices submitted must remain firm for one hundred and eighty (180) calendar days from the proposal opening date unless extended by mutual written agreement of the Town and the Proposer.

The Town intends to select and notify the successful Proposer of its intent to award the project contract to them contingent on funding within sixty (60) calendar days following the proposal opening. During the intervening 120 days, the Town and the selected Proposer will finalize agreement on the Town's standard contract language (Attachment F). The Town expects that the Proposer will execute the agreed-upon goods/services contract promptly upon confirmation that funding is available for the project.. These periods may be extended by mutual written agreement between the Town and the successful Proposer.

Until the contract is executed, the Town reserves the right to cancel this RFP or reject any or all proposals, in whole or in part, if it determines that such action is in the best interests of the Town.

All proposals are due by 2 PM, Wednesday, October 21, 2026

II. General Information

A. Point of contact and issuing office:

Chief Procurement Officer

Eric Anderson
Town Manager
Town of Dalton
462 Main Street
Dalton, MA 01226

Phone: (413) 684-1111 ext 201
Fax: (413) 684-8440
Email: EAnderson@dalton-ma.gov

Ad Hoc Town Database Committee

Thomas Irwin, Chair
Town of Dalton
462 Main Street
Dalton, MA 01226

Phone: 518-248-1140 (cell)
Fax: (413) 684-8440
Email: stormwater@dalton-ma.gov

B. Proposal Preparation Costs

The Town of Dalton assumes no liability for any costs incurred by Proposers in preparing or submitting responses to this RFP, or in participating in any interviews, or providing additional information, or any other pre-contract activity.

C. Questions

All questions regarding this RFP must be submitted no later than **5:00 p.m. on Thursday, October 1, 2026**, to the Chief Procurement Officer (CPO) identified in Section IIA. Electronic (email) submission is acceptable. Each submission must include the date of submission, name of the individual posing the question, company name, mailing address, phone number, and e-mail address. Every effort will be made to provide responses within 2 business days of the question being asked.

All submitted questions and answers will be distributed by email to all parties who received the RFP. Proposers who prefer to receive responses, updates and addenda by fax, must notify the CPO by email and provide the fax number that should be used.

It is the Proposer's responsibility to perform due diligence. Failure to perform full due diligence does not relieve the Proposer from fulfilling project requirements.

D. Amendments to this Request for Proposal

The Town reserves the right to amend this RFP at any time prior to the proposal submission deadline. Any such amendments will be issued by an addendum and distributed to all recipients of the original RFP.

E. Quality Requirements

Proposers must meet all requirements of Section II.E listed below and provide all services described in Section IV: Scope of Work.

1. **Cost for Services:** Proposer must list project implementation costs, training costs, and database maintenance costs as separate prices (See Attachment B). If the proposed system consists of more than 1 module, please submit with Attachment B in the Price Proposals, a separate pricing attachment that provides the breakdown of costs for each module. Please also provide separately pricing for any scalable modules included in your system, such as system memory up to 2 TB, metadata extractions performed per year up to 300,000, AI functions, website search accesses up to 100,000 per year, up to 20 read/write users and up to 30 read-only users.
2. **Compliance with Applicable Laws:** The Proposer must state in their proposal that it will comply with all applicable federal and state laws, regulations, and requirements applicable to the project, including those noted in Attachment D associated with the requirements of the Compact IT Grant and Massachusetts public records and records management laws.
3. **Experience and Stability:** Proposers must have been in the business of providing municipal database services for a minimum of ten (10) years.
4. **Recent Comparable Contracts:** Proposers must submit references for a minimum of four (4) but no more than ten (10) database systems implemented within the past five (5) years that are similar in size and scope to this project. Three of these would preferably be implementations that have the configuration recommended for Dalton, including connection with a website from which the database is searched. Preference is for projects completed in Massachusetts or an adjoining state. Please include client name, contact names, telephone numbers, email addresses, location addresses, project name, services provided and dates of service.
5. **Project Management Qualifications:** The proposed Project Manager must have successfully completed at least five (5) projects of comparable size and scope and have at least five (5) years of directly relevant experience.
6. **Staffing Plan:** Proposers must submit a staffing plan listing the name, title or position, and specific role of each individual who will contribute substantially to the project. A current résumé must be included for each team member listed.
7. **Database hosting:** Proposers must as part of this contract include database hosting under this agreement from the date the database goes live through to June 30, 2027. **Pricing** for this service must be separated from the database upgrade costs and must be invoiced separately from database upgrade work. Proposers must quote the annual hosting fee(s) and a pro-rated fee from the go live date to end FY27 (please refer to Attachment B).

F. Solicitation Process

This procurement will follow a multi-phase evaluation process:

Phase One – Technical Proposal Submission:

Proposers must submit five (5) copies each of separate sealed “priced” and “non-priced” proposals in (2) separate envelopes clearly marked “Town Database Services Proposal – **Complete Proposal**”, including pricing Attachment B and any additional pricing information requested in this RFP, and “Town Database Services Proposal - **Without Pricing**”.

All prices submitted in response to this RFP must remain firm for one hundred and eighty (180) days after bid opening.

A proposal must be signed as follows: 1) if the Proposer is an individual, by her/him personally; 2) if the Proposer is a partnership, by the name of the partnership, followed by the signature of each general partner; and 3) if the Proposer is a corporation, by the authorized officer, whose signature must be attested to by the Clerk/Secretary of the corporation and the corporate seal affixed.

Phase Two – Evaluation and Shortlisting:

An Evaluation Committee will review and rank the technical proposals based on the criteria set forth in Section VI – **Proposal Evaluation Criteria**. A shortlist of Proposers will be selected for further consideration. At the Town’s discretion, this phase may include interviews.

As part of the evaluation process, the Town may conduct due diligence on Proposers, including but not limited to an assessment of qualifications, financial stability, project approach, proposed timeline, and the quality of personnel and materials.

Phase Three – Selection and Contract Award:

Following completion of the proposal evaluation process, the Town will select the Proposer deemed most advantageous. The proposed contract amount of the selected firm will be used to prepare a Warrant Article for funding consideration at the Annual Town Meeting, scheduled for May 3, 2027. It is anticipated that funding will be provided through a transfer from the Town’s Free Cash Account.

Award of the contract is contingent upon approval of funding by Dalton residents at the Annual Town Meeting. The contract must also be approved by the Select Board and the Chief Procurement Officer. No work may commence until all necessary approvals are secured and the contract has been fully executed.

Special Note: The Town reserves the right, in its sole discretion, to terminate contract negotiations with any Proposer, with or without cause, at any time prior to execution of the final agreement if deemed in the Town’s best interest.

G. Conditions of Award

To be eligible for award, the Proposer must submit the following with their proposal:

- A signed **Certificate of Non-Collusion** (Attachment A),
- A signed **Tax Compliance Certification** (Attachment A),

- Documentation of required **insurance coverage** (Attachment C).

It is the Town's intent to award the contract to the most responsive and responsible Proposer whose submission best meets the criteria outlined in this RFP. The Town reserves the exclusive right to determine which proposal best serves its interests.

Proposal pricing must remain firm throughout the term of the contract.

Any successful Proposer shall indemnify and hold harmless the Town of Dalton, its employees and agents, and any successors or assigns from any and all claims, judgments, fines, or costs of defense (including attorney's fees) arising out of or as a result of or in connection with his/her performance of his/her obligations under the contract for services, including any nonfeasance, misfeasance, or malfeasance; or arising out of or as a result of the breach of any representation or warranty given by the contractor. This indemnification and hold harmless clause shall survive the expiration or termination of the contract.

H. Proposed schedule and target dates:

Proposer Question Period Closes	5:00PM, Thursday, October 1, 2026
Final Question Responses Issue Date.....	5:00PM, Wednesday, October 7, 2026
Proposals Due	2:00 PM, Wednesday, October 21, 2026
Proposal Opening.....	5:00 PM, October 21, 2026
Estimated Date of Proposer Selection & Notification	December 16, 2026
Estimated Compact IT Grant submission deadline	February 5, 2027
Estimated Contract Commencement Date	upon award of Compact IT Grant
Required Project Completion Date	18 months after Compact IT Grant Awarded

I. Additional Information

Proposals will be considered only from Proposers who can demonstrate financial stability and sufficient resources to successfully complete and manage the project. The Town reserves the sole right to determine whether a Proposer meets these standards.

The Town may request additional information during the review process. Failure to respond promptly to such requests may render the proposal being considered incomplete.

The Town of Dalton reserves the right to:

- Reject any and all proposals, in whole or in part
- Waive any technicalities or informalities
- Cancel or amend the RFP at any time prior to the proposal deadline
- Clarify ambiguous language arising from clerical errors.

After proposal opening, no changes may be made that would give one Proposer a competitive advantage over another. If a mistake is clearly evident on the face of the proposal, the Town may correct the mistake and notify the Proposer in writing; however, the Proposer may not withdraw the proposal.

III. Dalton Community Profile and Background

Dalton is a town of 6,200 residents located in western Massachusetts. Our documentation system presently consists primarily of hardcopy records and a limited number of documents saved on hard drives. Other than Clerk and Assessor electronic records, the Town's records are not easily searched and documents, sometimes important hardcopy documents, are occasionally lost. We are presently planning to address this situation with an easily searched, cloud-based, secure, electronic database system.

Another justification for this project is meeting the Massachusetts document retention requirements for documents that must be retained **for more than 10 years or permanently**. In addition, the system will store all studies and drawings commissioned by the Town, court decisions involving the Town, prior versions of Town bylaws, and similar documents of long term value. Dalton does not intend to store invoices or other similar routine financial documents.

Since the system will primarily contain historical and long-term records rather than records used in day-to-day operations, it is anticipated that employees will most often locate records through searches rather than by directly navigating to a known file location.

Dalton is comprised of two municipal entities, a Fire District and the Town, which manages all non-Fire District matters. These two entities will be sharing access to the Town's proposed database, and each entity will be allowed access to only their municipality's information. The desired system will support both Read/Write and Read only users.

At present, Dalton does not have an in-house IT person. Instead, a third-party consultant manages our servers, fiber-based intranet, firewall, backups, and desktop computers. As a result, Dalton's preferred solution will require very limited in-house IT support.

Scope of Dalton's Database Needs

Based on our current understanding, the cloud-based storage system features of greatest value to Dalton include:

1. Sufficient long range storage capacity (minimum 500 GB initially; able to expand to 2 TB)
2. System Access Controls controlling which documents are uploaded and deleted and by whom
3. A storage system that includes tools such as **metadata**, OCR, and AI features to facilitate the generation of needed metadata as well as provide very accurate, time saving searches.
4. Ability of the database to integrate with the Town website, possibly through an API, and to support searches initiated from the website
5. A robust disaster backup approach for the database
6. Security supported through password protected directory access and write ability as well as audit trail and chain of custody tracking
7. Minimal reliance on dedicated IT staff and minimal IT expertise required of Town employees.

Additional less critical features include:

1. Records Retention Automation
2. Configurable Version Control with retention of prior versions
3. Support responding to public records requests efficiently, allowing documents to be located, reviewed, and records reports generated in a timely and transparent manner.

Of note, we view metadata as a critical tool that holds the potential to provide high quality searches while minimizing the reliance on a file directory structure, which may better meet our long-term operational needs without needing additional IT support. Additionally, we need the proposed system to support compliance with applicable Massachusetts public records and records retention laws, including associated records management requirements.

Our current concept for database layout is a system with separate directories for each committee, board and town department. Optimally, the system would require no subdirectories.

Specific Metadata of Interest to Dalton:

Static Data

1. Department/Committee who generated or is responsible for the document
2. Date original document was published
3. Person who loaded record into database
4. Date/time scanned
5. File Access: **Public vs Private**
6. Municipality: Town vs Fire District
7. Page size (std, legal, etc.)
8. Title of document
9. Number of pages
10. File type (jpeg, pdf, etc.)
11. Document type: engineering study, court decision, agenda, minutes, warrant, marriage/birth/death certificate, etc.
12. Required retention expiration date

Dynamic Data

1. Number of times accessed
2. Date of last access

IV. Proposal Scope

As noted in section II.H, the town anticipates initiating this project contingent on Dalton being awarded a Compact IT Grant. We estimate that the Town currently has a combined total of approximately 120–150 file drawers and bank boxes that could be digitized and stored through this project. The actual quantity included in the project will depend upon the database provider's pricing, the digitization vendor's pricing, and the actual amount of the Compact IT Grant awarded.

The successful Proposer shall provide a system and associated services that include the following:

1. Configure and implement a searchable, secure, cloud-based archival database.
2. Accept digitized and electronic documents and store them in the database.
3. Automatically populate metadata to support highly efficient searches with limited IT support.
4. Support secure role-based dual factor authentication access and public website searches.
5. Provide comprehensive disaster recovery and backup capabilities described in a written plan
6. Provide training for current and future Town personnel.
7. Provide all necessary ongoing hosting, system support, and user support.

V. Requested Additional Proposal Information

To best understand your approach to this project, we would appreciate receiving a proposal that provides:

1. How your product would address each of Dalton's 7 primary needs and 3 secondary needs.
2. The number of Read/Write system users and Read Only users included with your proposed system that would have password access and whether your system supports dual factor authentication.
3. A brief description of the formal security frameworks and certifications your system employs and how these protections are implemented.
4. The time window needed from a new document being received to the document being placed in the appropriate directory and becoming searchable, and what impact batch uploads may have on turnaround time. Please identify the step, if any, that is the primary factor limiting document throughput (e.g., OCR processing, metadata extraction, quality control, or other).
5. The file naming convention that is recommended for new documents Dalton sends to the database that will facilitate best metadata development and accuracy of future searches.
6. A description of the method you would recommend to automatically populate the metadata you would require for highly accurate searches in an environment that minimizes the number of directories.
7. A description of how user-defined metadata fields such as "Public" vs. "Private," "Town" vs. "Fire District," originating department or committee, are best communicated to the database and whether user definable metadata fields exist and whether these have historically been easy to populate and whether IT support is in any way needed for this.

8. Please indicate whether the system can be configured to automatically assign Massachusetts records retention periods to documents and store the applicable retention period or expiration date as user-searchable metadata without requiring an automated records retention module and how this capability is implemented.
9. Please describe the folder or directory structure, including the number of directory levels that, based on your experience, you believe would best meet Dalton's needs as described in this RFP. Please include in your description a discussion of the relative importance of metadata and how metadata would be used in conjunction with the proposed structure to organize, search for, and retrieve documents.
10. A description of support provided for database read/write users, administrators and 3rd party IT support personnel. Please include your support methods (telephone, email, portal, etc.), typical response times, and availability of after-hours emergency support. Dalton's hours during which support requests are most likely are Monday through Friday 8:00 AM – 6:00 PM Eastern Time.
11. A brief description of the recommended approach for initially loading records into the database during the transition to a new system, since Dalton's records are currently a mix of paper and electronic files.
12. The anticipated implementation timeline, including the configuration time required before the system can begin processing documents for storage; the steps and estimated time required to load approximately 500,000 documents into the database; the preferred timing for implementing the API link to the Town website; and the steps required to demonstrate successful document searches and retrieval by both authenticated users and the public through the Town website. Completion of metadata creation and all associated billing for this work shall occur within the 18-month period allowed by the Compact IT Grant.
13. Note what IT support from Dalton your system expects during both initial setup and for future ongoing operations.
14. Describe the standard reports and usage statistics your system can generate on a monthly or annual basis and how such statistics are accessed by a client. The following details are of particular interest to Dalton. Please address whether this information is readily available and identify any additional reports you believe would assist the Town in managing its electronic records system:
 - a. The number, source, and memory requirements for documents loaded into the database
 - b. The number of record searches from the Dalton website, by read-only users and by read/write users
 - c. The number of documents loaded listed by directory or by read/write user who loaded the document
 - d. The number of documents deleted listed by directory or by read/write user who deleted the document

15. Please describe other available features that your product has that you believe would provide important enhancements to the system Dalton is looking to create. Please explain how this feature would improve the operation of the database and indicate whether it is included in the base proposal or available as an option. If available as an option, please identify any associated one-time and recurring costs.
16. Comments about any practical limitations, assumptions, or prerequisites that you believe Dalton should understand before implementing your recommended system.
17. Please identify any additional one-time or recurring charges not otherwise identified in your proposal.

VI. Proposed Project Implementation Approach

Dalton will be using the proven approach to efficiently perform the initial loading of documents into the database. A third party will be contracted to scan and digitize Dalton records and drawings into pdf/A and TIF formats, create filenames for the files in accordance with the database vendors naming convention, and load the named files into a new-file directory to which the database vendor has access. We anticipate that the vendor will monitor the new-file directory and retrieve any files in the directory, extract all needed metadata, store the document in the appropriate directory according to the board, committee or department associated with the document, and be ready for searches any time after the document is loaded into the directory.

After the initial loading portion of the project is complete, Read/Write users will be performing scanning of documents, generating pdf/A documents, naming them according to protocol, and loading them into the new-file directory. The number of such documents is estimated to be no more than 10,000 per year.

VII. Proposal Evaluation Criteria

Finalist selection will be conducted by a Selection Committee and based on the criteria below. Proposals will be rated as: **Highly Advantageous**, **Advantageous**, **Not Advantageous**, or **Unacceptable**, depending on the degree to which they meet the evaluation standards.

References may be checked, and applicants may be invited to interview during the selection process. Each proposal should directly and clearly address the following evaluation criteria for **each service item** included in the proposal:

- a) **Proposal is written with concise well thought out comments that provide the information the committee requires to determine the optimal, cost-effective features that will provide a safe, easily managed, cloud-based, efficiently searched database system.**

Highly Advantageous

- Presented proposal has concise well thought-out comments throughout the submitted proposal. Sections of proposal align perfectly with the Scope of Work, and all quality requirements were addressed as requested.
- Few or no grammatical, typographical, or analytical errors.

Advantageous

- Presented proposal has concise well thought-out comments throughout most of the submitted proposal. Most sections of proposal align with the Scope of Work and all quality requirements were addressed as requested.
- Minor grammatical, typographical, or analytical errors that do not hinder comprehension.

Not Advantageous

- Presented proposal has concise comments throughout most of the submitted proposal. Most sections of proposal align with the Scope of Work and all but 1 of the quality requirements were addressed as requested.
- Multiple grammatical, typographical, or analytical errors affect the clarity of document.

Unacceptable

- Presented proposal comments in the submitted proposal were either not concise or well thought-out. Several sections of proposal do not align with the Scope of Work, and more than 1 quality requirements was not addressed as requested.

b) Quality of Proposer's approach to initially loading the system, database organization, metadata generation and use, and efficient document searches.

Highly Advantageous:

- Proposer has a well-defined, easy to follow method for initial loading of the database, including a well-thought-out approach for coordinating filenames with additional metadata.
- All user-defined metadata is easily created and accessed by user
- Proposes a simple, easily managed system that makes effective use of metadata and minimizes reliance on subdirectories and the need for IT support

Advantageous:

- Proposer has a fairly well-defined method for initial loading of the database and has a reasonable approach for coordinating filenames with additional metadata.
- Most desired user-defined metadata can be created and can be accessed by user
- Proposes a system that uses metadata effectively and relies on a layer of subdirectories and likely some IT support

Not Advantageous:

- Proposer has a method for initial loading of the database that appears somewhat challenging to follow and does have an approach for coordinating filenames with additional metadata
- Some desired user-defined metadata can be created and can be accessed by user but not necessarily easily
- Proposes a system that uses metadata and relies on more than one layer of subdirectories and likely additional IT support

Unacceptable:

- Proposer does not use a metadata-centric search regimen; requires significant IT support; or has an initial loading process that is difficult to follow

c) Qualifications and Experience of Implementation and Long Term Management Team

Highly Advantageous:

- Proposal clearly identifies all key team members, their roles, and time commitments.
- All staff and subcontractor resumes show appropriate qualifications and experience.
- Staffing levels are well matched to project needs, and a clear, realistic schedule is presented.

Advantageous:

- Most team members, roles, and time commitments are identified.
- Staff resumes show qualifications that are generally appropriate, and staffing appears sufficient for project needs.

Not Advantageous:

- Staffing plan lacks detail or omits key information.
- Time commitments are unclear, and proposed staffing may be insufficient for the scope.

Unacceptable:

- Staffing plan does not demonstrate the capacity to successfully complete the project.

d) Response to Scope of Work Requirements

Highly Advantageous:

- Proposal is clear, well-organized, and easily understood by both technical and non-technical audiences.
- Few or no grammatical, typographical, or analytical errors.

Advantageous:

- Proposal is generally clear and understandable, with minor errors that do not hinder comprehension.

Not Advantageous:

- Proposal is difficult to follow, overly technical, or poorly organized.
- Multiple errors affect the clarity of the document.

Unacceptable:

- Proposal does not demonstrate the communication skills necessary to successfully perform the work.

e) Proposed system is easily searchable from Dalton Town website and is scalable with sensible increments for additional read/write users; read only users; memory; website user searches; and other scalable metrics.

Highly Advantageous:

- All scalable increments are appropriate for Dalton's size and expected growth.
- Proposed system easily connects to Town Web websites and consistently provides efficient searches from the website
- Identifies and proposes appropriate additions or improvements to the Scope of Work.

Advantageous:

- Most scalable increments are appropriate for Dalton's size and expected growth.
- Proposed system connects to Town Web websites and is searchable from the website with infrequent issues
- Identifies minor additions or refinements to the Scope of Work, where warranted.

Not Advantageous:

- Some scalable increments are appropriate for Dalton's size and expected growth.
- Proposed system connects to Town Web websites with some difficulty and/or is searchable from the website with occasional issues

Unacceptable:

- Scalable increments are not appropriate for Dalton's size or database is unable to connect with Dalton's website.

f) Technical support accessibility during Dalton's hours of operation

Highly Advantageous:

- Technical support availability covers and or exceeds all Dalton operation hours.

Advantageous:

- Technical support availability covers all but 1 hour daily that Dalton Town Hall is open

Not Advantageous:

- Technical support availability covers 75% of the hours that Dalton Town Hall is open.

Unacceptable:

- Technical support is available for <50% of the hours that Dalton Town Hall is open

g) Results of Reference Checks

Highly Advantageous:

- All references indicate the Proposer and key personnel have successfully completed similar projects on time and within budget.
- Quality of database experiences of similar communities both with the initial loading of documents, ongoing year-to-year operation and technical support all being highly effective.

Advantageous:

- Most references are positive, with one noting minor issues related to schedule or budget.

Not Advantageous:

- References reveal concerns about experience, timeliness, or budget control.
- Two references noted issues with project delivery.

Unacceptable:

- References do not support Proposer's qualifications or indicate poor performance on past projects.

h) Quality of Interview (if conducted)

Highly Advantageous:

- Key project personnel, including the Project Manager, participated and demonstrated strong communication skills, technical expertise, and a thorough understanding of the project and required services.

Advantageous:

- Key personnel participated and demonstrated adequate understanding and qualifications.

Not Advantageous:

- Interview responses were unclear, incomplete, or showed limited knowledge of the scope.

Unacceptable:

- Interview did not demonstrate that the team has the skills or understanding necessary to complete the project successfully.

ATTACHMENT A
Certificate of Non-Collusion

TOWN DATABASE SERVICES

Under Massachusetts General Laws Ch. 30B, Sec. 10 the following Certification must be provided:

“The undersigned certifies under penalties of perjury that this proposal or proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word “person” shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.”

Authorized Official’s Signature

Title of Person Signing

Typed or Printed Name of Person Signing

Company Name

Telephone Number

Address

Fax Number

City/Town, State, Zip

Date: _____

Town of Dalton
Certificate of Tax Compliance

TOWN DATABASE SERVICES

Pursuant to Chapter 62C of the Massachusetts General Laws, Section 49A(b), I, the undersigned, authorized signatory for the below named Proposer, do hereby certify under the pains and penalties of perjury that said Proposer has complied with all laws of the Commonwealth of Massachusetts relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

Authorized Official's Signature

Title of Person Signing

Typed or Printed Name of Person Signing

Company Name

Telephone Number

Address

Fax Number

Address

Date: _____

Tax ID Number: _____

ATTACHMENT B Proposal Pricing Sheet

TOWN DATABASE SERVICES

Please indicate price proposal in numbers:

- | | | |
|--|----|--|
| 1. Prorated Annual Support Cost for initial partial year | \$ | |
| 2. Metadata generation cost for 500,000 documents | \$ | |
| 3. Other startup / initial implementation costs | \$ | |
| 4. Training Cost | \$ | |
| Total Proposal Cost: | \$ | |
| 5. Future Annual Support Cost | \$ | |

Print/Type your total proposal amount in written form:

Name of Proposer organization

Printed name of person signing proposal

Signature of person signing proposal

Title

Date

Address

Hourly Rates

- | | | |
|------------------------------|----|--|
| a. Program Manager | \$ | |
| b. Implementation Specialist | \$ | |
| c. Database Specialist | \$ | |
| d. Training Specialist | \$ | |

ATTACHMENT C

INSURANCE REQUIREMENTS

TOWN DATABASE SERVICES

1. The Proposer shall purchase and maintain such insurance as will protect the Proposer from claims set forth below which may arise out of or result from the Proposer's operations under the Contract, whether such operation be by itself or by any subcontractor or by anyone directly or indirectly employed by any of them or by anyone for whose acts any of them may be liable.
 - 1.1 Claims under Worker's Compensation, disability benefit, and other similar employee benefit acts;
 - 1.2 Claims for damages because of bodily injury, occupational sickness or disease, or death of its employees, and claims insured by usual personal injury liability coverage;
 - 1.3 Claims for damages because of bodily injury, sickness or disease or death of any person other than its employees, and claims insured by usual person injury liability coverage; and
 - 1.4 Claims for damages because of injury to or destruction of tangible property, including loss of use resulting therefrom.
 - 1.5 Claims arising from professional negligence; errors or omissions; and cyber incidents.
2. The insurance required by the above shall be written for not less than the following minimum limits of liability:

Comprehensive liability, including bodily and personal injury, property damage, and contractual liability	\$1,000,000 per occurrence
---	----------------------------

Automobile comprehensive liability to include owned, hired, and non-owned vehicles and equipment	\$500,000 per occurrence
--	--------------------------

Excess liability (umbrella coverage)	As needed to provide a minimum of \$2,000,000 per occurrence coverage listed above.
--------------------------------------	---

Errors and Omissions (Professional Liability)	\$1,000,000 per occurrence \$3,000,000 aggregate
---	---

Cyber Liability Insurance	\$1,000,000 per occurrence \$3,000,000 aggregate
---------------------------	---

In addition, during the entire Contract Period, the Contractor, at its own expense, shall maintain for its employees all Workers' Compensation coverage required by Massachusetts Law.

3. The above insurance policies shall also be subject to the following requirements:

3.1 Certificates of Insurance acceptable to the Town, naming the Town of Dalton as an Additional Insured where applicable, shall be addressed to and filed with the Town prior to commencement of work. Renewal certificates shall be addressed to and filed with the Town at least ten (10) days prior to the expiration of the required policies..

3.2 No insurance coverage shall be subject to cancellation without at least thirty (30) days prior written notice forwarded by registered or certified mail to the Town. The Town shall also be notified of the attachment of any restrictive amendment to the policies.

3.3 All Certificates of Insurance shall contain true transcripts from the policies, authenticated by the proper officer of the insurer, evidencing, in particular, those insured, the extent of the coverage, the location, and operations to which the insurance applies, the expiration date and the above-mentioned notice clauses.

3.4 All premium costs shall be included in the Contractor's proposed cost quote.

ATTACHMENT D
APPLICABLE LEGAL REQUIREMENTS
FOR THE TOWN DATABASE SERVICES PROJECT

Compact IT Grant Contract Requirements Applicable to this Project

SECTION 2. DISBURSEMENT OF EOAF GRANT

2.4 The Grantee shall be responsible for any cost overruns that occur during implementation of the Project

SECTION 4. COMPLIANCE WITH ALL APPLICABLE LAWS/REGULATIONS

4.1 The Grantee and its consultants and contractors shall comply with any and all federal, state and local laws, rules and regulations, orders or requirements that apply to the Project, including but not limited to: (i) Executive Order 478 relating to nondiscrimination, diversity, equal opportunity and affirmative action in hiring and employment practices; (ii) the State Prevailing Wage Law (MGL. Ch.149, Sections 26 to 27H); Title VI of the Civil Rights Acts of 1964, as amended; (iii) Environmental Impact Requirements (MGL. Ch.30, Sections 61 to 62I); and (iv) Historic Preservation Requirements (MGL. Ch.9, Sections 26 to 28) and applicable regulations.

4.2 This Agreement shall in no way relieve the Grantee from the full force and application of any laws, rules, regulations and orders or requirements.

SECTION 6. AMENDMENTS

6.1 No amendment to this Agreement or any significant modification of the scope of the Project funded under this Agreement shall be made by the Grantee without the prior written approval of EOAF

Massachusetts Public Records Law Requirements

Dalton is required to comply with all applicable federal and Massachusetts laws, regulations, and requirements governing public records, records management, and records retention. Applicable Massachusetts requirements include, but are not limited to, M.G.L. c. 4, § 7(26), c. 30, § 42, and c. 66, §§ 1, 8 and 9.

ATTACHMENT E
EVALUATION WORKSHEET
FOR TOWN DATABASE SERVICES

PROPOSER: _____

EVALUATOR: _____

Rating Key

- **HA – Highly Advantageous:** Proposal significantly exceeds the evaluation standard.
- **AD – Advantageous:** Proposal meets the evaluation standard.
- **NA – Not Advantageous:** Proposal does not fully meet the standard or lacks clarity/detail.
- **UA – Unacceptable:** Proposal does not meet the standard.

Selection Criteria (as defined in RFP)

a) Quality of proposal

(well thought out comments; aligns with scope of work; all quality requirements addressed)

☐ HA ☐ AD ☐ NA ☐ UA

Comments:

b) Approach to loading system and using metadata to provide efficient searches

(Ease of initial and long term loading processes, user metadata, directory structure)

☐ HA ☐ AD ☐ NA ☐ UA

Comments:

c) Qualifications and Experience of Implementation and Long Term Management Team

(Education, certifications, and relevant project experience.)

☐ HA ☐ AD ☐ NA ☐ UA

Comments:

d) Response to Scope of Work Requirements

(Understanding of project, work plan credibility, timeframes, and contingency planning.)

☐ HA ☐ AD ☐ NA ☐ UA

Comments:

e) Scalability of proposed system matches Dalton’s likely future needs

(memory; website user searches; metadata extractions; read/write & read-only users)

☐ HA ☐ AD ☐ NA ☐ UA

Comments:

f) Technical support accessibility during Dalton’s hours of operation

(coverage hours versus Dalton hours of operation)

☐ HA ☐ AD ☐ NA ☐ UA

Comments:

g) Reference Checks

(Met client expectations; initial loading and ongoing experience; effective scalability; and quality ongoing support.)

☐ HA ☐ AD ☐ NA ☐ UA

Comments:

h) Interview Performance (if applicable)

(Team readiness, understanding of project scope, and clarity in presentation.)

☐ HA ☐ AD ☐ NA ☐ UA

Comments:

ATTACHMENT F

Sample Agreement

Please find the Town's standard agreement below, which the winning Proposer will be expected to sign.

AGREEMENT

FOR

The following provisions shall constitute an Agreement between the Town of _____, acting by and through its _____, hereinafter referred to as "Town," and _____, with an address of _____, hereinafter referred to as "Contractor", effective as of the ____ day of _____, 202__. In consideration of the mutual covenants contained herein, the parties agree as follows:

ARTICLE 1: SCOPE OF WORK:

The Contractor shall perform all work and furnish all services necessary to provide the Town with _____, including the scope of services set forth in Attachment A.

ARTICLE 2: TIME OF PERFORMANCE:

The Contractor shall complete all work and services required hereunder commencing _____, 202__ through _____.

ARTICLE 3: COMPENSATION:

The Town shall pay the Contractor for the performance of the work outlined in Article 1 above the contract sum of \$_____. The Contractor shall submit monthly invoices to the Town for services rendered, which will be due 30 days following receipt by the Town.

ARTICLE 4: CONTRACT DOCUMENTS:

The following documents form the Contract and all are as fully a part of the Contract as if attached to this Agreement or repeated herein:

1. This Agreement.
2. Amendments, or other changes mutually agreed upon between the parties.
3. All attachments to the Agreement.

In the event of conflicting provisions, those provisions most favorable to the Town shall govern.

ARTICLE 5: CONTRACT TERMINATION:

The Town may suspend or terminate this Agreement by providing the Contractor with ten (10) days written notice for the reasons outlined as follows:

1. Failure of the Contractor, for any reason, to fulfill in a timely and proper manner its obligations under this Agreement.
2. Violation of any of the provisions of this Agreement by the Contractor.
3. A determination by the Town that the Contractor has engaged in fraud, waste, mismanagement, misuse of funds, or criminal activity with any funds provided by this Agreement.

Either party may terminate this Agreement at any time for convenience by providing the other party written notice specifying therein the termination date which shall be no sooner than thirty (30) days from the issuance of said notice. Upon receipt of a notice of termination from the Town, the Contractor shall cease to incur additional expenses in connection with the Agreement. Upon such termination, the Contractor shall be entitled to compensation for all satisfactory work completed prior to the termination date as determined by the Town. Such payment shall not exceed the fair value of the services provided hereunder.

ARTICLE 6: INDEMNIFICATION:

The Contractor shall defend, indemnify and hold harmless the Town and its officers, agents, and all employees from and against claims arising directly or indirectly from the contract. Contractor shall be solely responsible for all local taxes or contributions imposed or required under the Social Security, Workers' Compensation, and income tax laws. Further, the Contractor shall defend, indemnify and hold harmless the Town with respect to any damages, expenses, or claims arising from or in connection with any of the work performed or to be performed under this Agreement. This shall not be construed as a limitation of the Contractor's liability under the Agreement or as otherwise provided by law.

ARTICLE 7: RECORD PROTECTION AND RECOVERY:

The Contractor shall be solely responsible for the security, confidentiality, integrity, and availability of all Town records and associated metadata while under its custody or control.

The Contractor shall maintain backup and disaster recovery procedures sufficient to protect Town records from loss, corruption, unauthorized access, or destruction.

In the event of any loss, corruption, unauthorized disclosure, or inability to recover Town records resulting from the Contractor's acts, omissions, or failure to maintain appropriate safeguards, the Contractor shall promptly notify the Town and, at its sole expense, take all reasonable actions necessary to restore the affected records and return the system to full operational status.

These obligations shall survive completion or termination of this Agreement.

ARTICLE 8: AVAILABILITY OF FUNDS:

The compensation provided by this Agreement is subject to the availability and appropriation of funds.

ARTICLE 9: APPLICABLE LAW:

The Contractor agrees to comply with all applicable local, state and federal laws, regulations and orders relating to the completion of this Agreement. This Agreement shall be governed by and construed in accordance with the law of the Commonwealth of Massachusetts.

ARTICLE 10: ASSIGNMENT:

The Contractor shall not make any assignment of this Agreement without the prior written approval of the Town.

ARTICLE 11: AMENDMENTS:

All amendments or any changes to the provisions specified in this Contract can only occur when mutually agreed upon by the Town and Contractor. Further, such amendments or changes shall be in writing and signed by officials with authority to bind the Town. No amendment or change to the contract provisions shall be made until after the written execution of the amendment or change to the Contract by both parties.

ARTICLE 12: INDEPENDENT CONTRACTOR:

The Contractor acknowledges and agrees that it is acting as an independent contractor for all work and services rendered pursuant to this Agreement and shall not be considered an employee or agent of the Town for any purpose.

ARTICLE 13: INSURANCE:

The Contractor shall be responsible to the Town or any third party for any property damage or bodily injury caused by it, any of its subcontractors, employees or agents in the performance of, or as a result of, the work under this Agreement. The Contractor and any subcontractors used hereby certify that they are insured for workers' compensation, property damage, personal and product liability. The Contractor and any subcontractor it uses shall purchase, furnish copies of, and maintain in full force and effect insurance policies in the amounts here indicated.

General Liability

Bodily Injury Liability and

Property Damage Liability

Combined single limit	\$1,000,000 per occurrence
-----------------------	----------------------------

Automobile Liability

Bodily Injury Liability and

Property Damage Liability

Combined single limit	\$500,000 per occurrence
-----------------------	--------------------------

Workers' Compensation Insurance

Coverage for all employees in accordance with Massachusetts General Laws

Errors & Omissions (Professional Liability) Insurance

Minimum Coverage	\$1,000,000 per occurrence
	\$3,000,000 aggregate

Cyber Liability Insurance

Minimum Coverage:	\$1,000,000 per occurrence
	\$3,000,000 aggregate

Prior to commencement of any work under this Agreement, the Contractor shall provide the Town with Certificates of Insurance which include the Town as an additional named insured and which include a thirty day notice of cancellation to the Town.

ARTICLE 14: SEVERABILITY:

If any term or condition of this Agreement or any application thereof shall to any extent be held invalid, illegal or unenforceable by the court of competent jurisdiction, the validity, legality, and enforceability of the remaining terms and conditions of this Agreement shall not be deemed affected thereby unless one or both parties would be substantially or materially prejudiced.

ARTICLE 15: ENTIRE AGREEMENT:

This Agreement, including all documents incorporated herein by reference, constitutes the entire integrated agreement between the parties with respect to the matters described. This Agreement supersedes all prior agreements, negotiations and representations, either written or oral, and it shall not be modified or amended except by a written document executed by the parties hereto.

ARTICLE 16: COUNTERPARTS:

This Agreement may be executed in any number of counterparts, each of which shall be deemed to be a counterpart original.

CERTIFICATION AS TO PAYMENT OF STATE TAXES

Pursuant to Chapter 62C of the Massachusetts General Laws, Section 49A(b), I,

_____, authorized signatory for the Contractor do hereby certify under the pains and penalties of perjury that said Contractor has complied with all laws of the Commonwealth of Massachusetts relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

Social Security Number or
Federal Identification Number

Signature of Individual or
Corporate Name

By:
Corporate Officer
(if applicable)

IN WITNESS WHEREOF, the parties hereto have caused this Agreement to be executed on the day and year first above written.

CONTRACTOR

TOWN OF _____

By

by its **Board of Selectmen**

Printed Name and Title

Approved as to Availability of Funds:

_____ (\$_____)

Town Accountant

Contract Sum

530276/99999/0003