

CPC USE ONLY:	
Application #	<u>FY20-08</u>
Qualifies:	_____
Does not qualify:	_____

## INITIAL ELIGIBILITY PROJECT APPLICATION FORM

**DUE DATE: DECEMBER 6, 2019**

**TOWN OF NEEDHAM  
COMMUNITY PRESERVATION COMMITTEE**  
c/o Park & Recreation Department  
178 Rosemary Street  
Needham, MA 02494  
www.needhamma.gov/CPC

- 1. Applicant:** Theodora K. Eaton, Town Clerk      **Submission Date:** December 9, 2019
- 2. Applicant's Address, Phone Number and Email:**  
Town Clerk's Office  
1471 Highland Avenue  
Needham, MA 02492  
**Contact Name:** Theodora K. Eaton  
Teaton@needhamma.gov  
781-455-7500 x 216
- 3. Purpose:**  
*(Please select all that apply)*
- Open Space  
 Community Housing  
 Historic Preservation  
 Recreation
- 4. Project Name:** Town of Needham Marriage Records - 1700 - Present
- 5. Project Location/Address/Ownership (Control):**  
Town Clerk's Office      Ownership - Town of Needham  
Town Hall      under the control of the Town Clerk's  
1471 Highland Avenue      Office  
Needham, MA 02492
- 6. Amount Requested:**      \$ 22,465.88 Laserfiche Cloud)
- |                    |          |                    |
|--------------------|----------|--------------------|
| \$12,734.88        |          | \$12,734.88        |
| \$10,835.00        | (Avante) | 9,731.00           |
| <u>\$23,569.88</u> |          | <u>\$22,465.88</u> |
- 7. Estimated Total Project Cost (If Different):**      \$ Same
- 8. Critical Dates: (If Applicable)**      No Critical Dates

- continued -

CPC USE ONLY:	
Application #	FY20-08
Qualifies:	_____
Does not qualify:	_____

**Project Name:** Town of Needham Marriage Records: 1700 to Present

**9. Project Summary: In 100 words or less provide a brief summary of the project:**

The Town Clerk's Office is requesting funding for a project to help preserve the Town's Marriage Records by improving the way these records are maintained and accessed. The Project, more fully defined in the Statements of Work provided by the vendors who will be providing the services under State Contract, includes the scanning, indexing, and processing of more than 16,000 Marriage Records as well as the uploading of them into Laserfiche, a Content Management system used in more than 45 communities in Massachusetts and more than 35,000 around the country.

**10. Community Need: In 100 words or less provide a brief statement of the need for and the benefits to the community.**

The goal of the project is to protect the historical significance of the records by minimizing the number of times these records are physically handled by the Town's staff. Since all of the records will be digitized the need to access the paper documents will be dramatically reduced. Too - the software will enable immediate access to the records which will help to ensure a higher level of customer care for those who need legal documents - by reducing the amount of time needed to fulfill this task. Laserfiche software will enable the Town to enter new marriage records directly into the program as well as other Town documents - including birth and death records.

**Note:** *This application enables the Community Preservation Committee to review the request to assess eligibility. You shall be notified by January 1 of your eligibility. If eligible you will be requested to supply additional information by February 1.*



***Document Imaging Services***

**Town of Needham  
Norfolk County  
Massachusetts  
*(Marriage Books)***



A Member of the ICC Family of Companies

***Document Management Solution  
Scanned Image Indexing and Processing Services***



A Member of the ICC Family of Companies

## TOWN OF NEEDHAM, MA - INVESTMENT SUMMARY

**(THIS SUMMARY IS BEING PROVIDED FOR OVERVIEW PURPOSES ONLY. PLEASE REFER TO EACH RESPECTIVE PROPOSAL FOR COMPREHENSIVE PRICING AND PROJECT DETAILS.)**

PROJECT	VENDOR	DESCRIPTION	QUANTITY	UNIT PRICE	EXTENDED PRICE
<b>Total Indexing, Processing/Upload Pricing:</b>					
	Image Data	Document Conversion Services Project Estimate	1	\$11,571.37	\$ 11,571.37
	General Code	Processing/Keying/Uploading of Scanned Images	1	\$ 1,163.51	\$ 1,163.51
<b>TOTAL eIMAGING:</b>					<b>\$ 12,734.88</b>

*\*Pricing includes SHI surcharge*

# TOWN OF NEEDHAM, MA

## Norfolk County

### Marriage Books

November 21, 2019 *Revised*  
Valid for 6 months



## ***Document Management Solution***

## ***Scanned Image Processing Service***

Director of Sales: Bruce Cadman  
518-441-6496

[BCadman@generalcode.com](mailto:BCadman@generalcode.com)

## DOCUMENT CONVERSION / PROJECT DELIVERABLES / INVESTMENT DETAIL

### DOCUMENT CONVERSION PROJECT

Reference is made to the Document Scanning Proposal between Image Data, Inc. (“Image Data”) and the Town of Needham, MA (“Town”) dated August 18, 2019 (“Image Data Proposal”).

### PROJECT DELIVERABLES

The following deliverables are included in your project pricing. This price is based on the Project Assumptions as set forth in the Image Data Proposal.

- The document conversion services associated with the project will be performed by Image Data.
- Upon completion of the scanning portion of the project by Image Data, Image Data will upload the image files and index data to General Code.
- Once received from Image Data, General Code will key and process the images and index data into Laserfiche Viewer format and upload same onto the Town’s Laserfiche system at such time as the Town purchases Laserfiche.
- General Code is not responsible for the accuracy and quality of the images (e.g., black borders, skewed images, blurry images, non-legible images, etc.), index data or other errors on the scanning portion provided to General Code by Image Data.
- One (1) copy of the Laserfiche Viewer formatted documents will be provided on removable media.

### DOCUMENT INDEXING/PROCESSING SPECIFICATIONS

Document Type / Description		Est. of images	Est. of Documents
Marriage Books (93 Bound & Unbound)		16,275	93
Index Field(s)/Keying	Title		
Who is Keying/Indexing	Image Data		
Document Naming Convention	Title		
Document Organization (Folders)	Town Clerk/Vital Records/Marriages/Books/file		
Microfilm needed?	No		
Comments / Special Instructions			

### PROJECT MANAGEMENT AND OTHER SERVICES

- Our charge includes project management and assumes that all of the documents contained in this project will be imaged and provided by Image Data to General Code.
- Project Management will include job setup, creation of file structures and databases (as applicable) and Laserfiche Viewer containing images and data on removable media.
- Placement of the shipped documents in the Town’s repository will be performed as a courtesy service upon request of the Town.
- To schedule the placement of the documents, please contact Crista Deniz at 855-GEN-CODE.

**INVESTMENT DETAIL**

Our price is based upon the information set forth above and is valid for 6 months from the date of this Proposal.

Town of Needham, MA - Marriage Books				
	Est. of Images	Est. of Documents	Unit Price	Extended Price
<b>Document Keying/Indexing</b> on selected documents for population of template fields, creation of document naming and folder structure.		93	n/a	n/a
<b>Data Processing/Upload services</b> on all records into Laserfiche, including applying templates and indexing to images, file naming and folder structure creation.	16,275	Flat Charge		\$ 700.00
<b>OCR of Documents:</b> Utilizing OCR processing on all documents to extract type-written text. OCR will only identify type-written characters printed from left-to-right on the page.	16,275		\$ 0.006	\$ 97.65
<b>Delivery Fee</b> per delivery for processing, copying, delivery and upload of backfile documents.		1	\$ 300.000	\$ 300.00
<b>Project Management and other related services</b> including job setup, creation of file structures and database (as applicable) and Laserfiche viewer containing images and data on removable media.				<i>Included in per-image price</i>
<b>Total Indexing, Processing/Upload Pricing:</b>				\$ 1,097.65

State Contract Option via SHI <i>Please check if the optional component is to be included.</i>	
<input checked="" type="checkbox"/> <b>Please process this agreement through a State Contract Option</b>  <i>Procurement of this contract will utilize a service for pricing and payment terms only. Upon receipt of General Code’s signed agreement, a formal quote will be issued by servicing organization to the Town. The Town will issue a P.O. to said servicing organization, and all invoicing and payments will be conducted between this servicing organization and the Town. Delivery of products, installation, training and support will be conducted by General Code.</i>	
<b>State Contract Option (6% surcharge)</b>	<b>\$65.86</b>

**AUTHORIZATION & AGREEMENT**

The **Town of Newbury, New York** hereby agrees to the procedures outlined above, to General Code's Document Management Solution Terms & Conditions which are available at <http://cms.generalcode.com/terms-conditions> and are incorporated herein by reference as they apply to this proposal, and authorizes General Code to proceed with the project.

<i>Processing/Keying/Uploading of Scanned Images :</i>	\$ 1,097.65
<i>State Contract Option via SHI (6% surcharge): +</i>	\$ 65.86
<b><i>Estimated Total Investment:</i></b>	<b>\$ 1,163.51</b>

**Payment Schedule:**

General Code will invoice the Town for Indexing and Processing services upon shipment of each batch of the scanned documents to the Town.

**Performance Schedule:**

The project will be completed within 90 days of General Code's receipt from Image Data of all materials necessary to complete the project.

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*(Client please fill out)* Invoice for this Project to be sent to:  
 Department: \_\_\_\_\_ Contact Name: \_\_\_\_\_

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**TOWN OF NEEDHAM, NORFOLK COUNTY, MA**

By: \_\_\_\_\_ In the Presence of: \_\_\_\_\_  
 Title: \_\_\_\_\_ Title: \_\_\_\_\_  
 Date: \_\_\_\_\_ Date: \_\_\_\_\_

**GENERAL CODE, CMS, LLC**

By: \_\_\_\_\_ In the Presence of: \_\_\_\_\_  
 Title: \_\_\_\_\_ Title: \_\_\_\_\_  
 Date: \_\_\_\_\_ Date: \_\_\_\_\_

- In order to authorize the project:*
- 1. Sign the Proposal**
  - 2. Fax or email the Authorization & Agreement Section only to: [Sales@generalcode.com](mailto:Sales@generalcode.com) • fax (585) 328-8189**
  - 3. Mail the signed Proposal to General Code at: 781 Elmgrove Road • Rochester, NY 14624**
- General Code will then sign and mail a copy of this agreement back to the Town for its records.*







Pricing Proposal  
Quotation #: 18091703  
Created On: 11/21/2019  
Valid Until: 11/29/2019

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## Town of Needham

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### Theodora Eaton

1471 Highland Ave.  
Needham, MA 02492  
United States  
Phone: 781-455-7500  
Fax:  
Email: Teaton@needhamma.gov

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## Inside Account Manager

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### Kelsey Alcorido

290 Davidson Ave.  
Somerset, NJ 08873  
Phone: 800-527-6389 EXT 5553598  
Fax:  
Email: Kelsey\_Alcorido@SHI.com

All Prices are in US Dollar (USD)

Product	Qty	Your Price	Total
1 Marriage Books General Code - Part#: Contract Name: Software Reseller Contract #: ITS58	1	\$1,163.51	\$1,163.51
		Total	\$1,163.51

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## Additional Comments

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EULA attached

Thank you for choosing SHI International Corp! The pricing offered on this quote proposal is valid through the expiration date listed above. To ensure the best level of service, please provide End User Name, Phone Number, Email Address and applicable Contract Number when submitting a Purchase Order. For any additional information including Hardware, Software and Services Contracts, please contact an SHI Inside Sales Representative at (888) 744-4084.

SHI International Corp. is 100% Minority Owned, Woman Owned Business.  
TAX ID# 22-3009648; DUNS# 61-1429481; CCR# 61-243957G; CAGE 1HTF0

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*The products offered under this proposal are resold in accordance with the terms and conditions of the Contract referenced under that applicable line item.*



**Document Scanning Proposal  
For  
Town of Needham, MA**

**Submitted: August 19, 2019**

**Submitted By: Laurie Green  
Senior Account Executive  
Image Data, Inc.  
(518) 862-2740  
lgreen@imgdata.com**

# **Statement of Services**

## **Scope of Work**

### **1.0 OBJECTIVE**

The objective of this proposal is to provide preparation and book scanning for the Town of Needham's Marriage Books. The project will be converted in our Albany, New York production facility according to the requirements detailed in this Statement of Work.

Image Data Team will work closely with the designated representatives from the Town of Needham throughout the term of this project to provide for a smooth, timely, confidential and successful partnership.

### **2.0 SUMMARY OF CONTENTS**

The following sections are included in this SOW:

- Production Contacts
- Pickup and Delivery
- Conversion Services
- Transmission of Images
- Post Scan Indexing
- Delivery and File Back-up
- Facility, Production and QC Overview
- Pricing Schedules

### **3.0 PRODUCTION CONTACTS**

The conversion will be managed by a team consisting of the following Image Data individuals, who will be responsible for completion of production activities.

- |   |                          |
|---|--------------------------|
| 1. Kara Heniges<br>(518) 862-2740 ext. 1030 | Operations Manager       |
| 2. Ken Major<br>(518) 862-2740 ext.1023     | Director of IT           |
| 3. Laurie Green<br>(518) 862-2740 ext.1021  | Senior Account Executive |

### **4.0 PROJECT PICKUP AND DELIVERY SCHEDULES**

The Town of Needham will box all records for pick-up by driver and delivery to Image Data's production facility in Albany, or for shipment to Image Data. Shipment method, dates, schedules and volume of boxes to be determined.

Based upon the supplied image volumes, Image Data anticipates the production time on a typical pick-up to be 60 to 90 days from the date of pick-up.

## **5.0 DOCUMENT PREPARATION**

Document preparation will be needed to remove staples, paperclips, sticky notes and documents from books prior to scanning and will be completed by IDI.

## **6.0 CONVERSION SERVICES**

Documents will be scanned at 300 DPI to black and white, TIFF images. Image Data will provide a POC of the images and directory formats for approval by the Town of Needham prior to entering into production.

- Books are a mix of bound and un-bound
- Total of 93 books
- For bound books , do not cut spine
- 8 books have pages in plastic sleeves
- Do not scan attachments
- Nothing larger than 11x14
- Capture fronts only of pages, do not scan backs regardless of content
- All pages in plastic will be scanned in the plastic sleeve- (the images will be completely legible but may affect image sharpness)

Image Data is not able to improve the quality of a poor original. If poor quality originals are found, a “Best Image Available” document may be scanned prior to the original imaged document.

## **7.0 TRANSMISSION OF IMAGES**

Data will be transmitted to General Code for upload into Laserfiche software. NOTE: Load fees into LF are not included in this proposal and will be provided separately by General Code.

## **8.0 POST-SCANNING INDEXING & ORGANIZING**

IDI will index the images as follows:

- Title on front or spine of book

## **9.0 DELIVERY & FILE BACK-UP**

Once the file organization naming and indexing is complete your electronic records are ready to be delivered to the Town. The files may be brought into your existing Laserfiche system or you can store the records on the provided Laserfiche Viewer

## **10.0 IMAGE RETRIEVALS DURING PRODUCTION**

While the Records are at Image Data during production, a process will be determined for easy access to the images when requested. Requests by Authorized Representatives from the Town of Needham can be made via email and delivered via email, FTP, FedEx or UPS. The cost to would be \$17.00 per retrieval plus the imaging fee.

Retrieval: One record pulled from one file = one retrieval. All FedEx, USPS, UPS, or other ground service costs incurred are not part of this pricing structure and will be billed accordingly.

## **11.0 SERVICE LEVEL AND RETENTION**

Documents will be returned to the Town of Needham once scanning is complete.

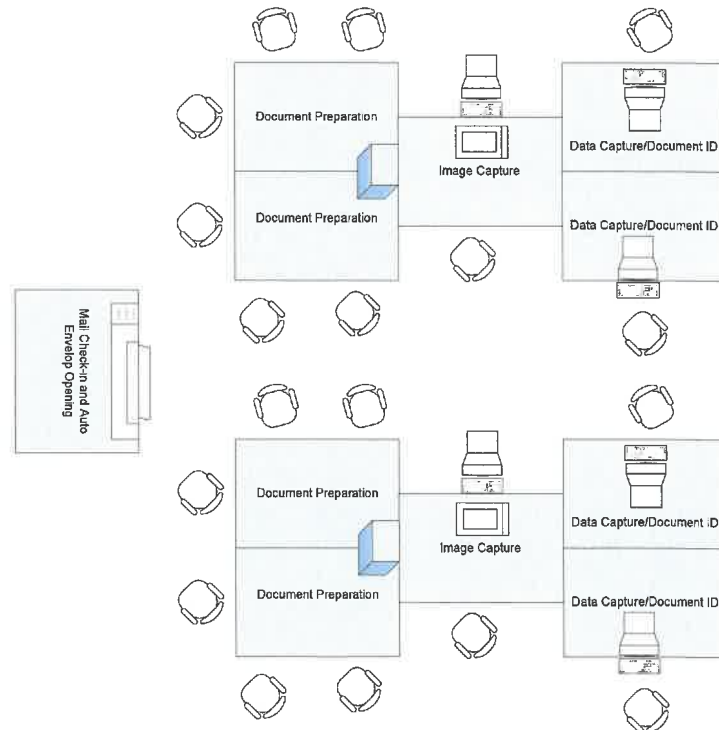
## 12.0 PRODUCTION AND QUALITY CONTROL (QC) OVERVIEW

### Lean Sigma Cells

All IMAGE DATA centers operate in a Lean Sigma Cell design. This design ensures efficiency by eliminating delays in any work queue. Work is not stacked or bottlenecked with the possibility that errors may be contained in an over produced work station. With this workflow design, all elements are synchronized to maximize a daily throughput rate by balancing and managing workloads at each station of the cell. The error prone design of separating prep/imaging/index/document identification within different areas of the room is not utilized by Team IMAGE DATA. Errors are virtually eliminated by employees working side-by-side to ensure that process or product deficiencies are reported to the previous station. This flow enables the Lean Cell to find and correct deficiencies instantly, ensuring that the correction is made at the time of occurrence. In addition, our Lean Sigma work cells process the information in smaller batches, resulting in faster net throughput times. Fast processing times promote the turnaround times required and ensures quality assurance checks continue to be completed in conjunction with deliverable times. Team IMAGE DATA will create a lean cell for each unique task order under this agreement.

Lean Sigma continuously improves overall production and eliminates errors resulting in providing the Town of Needham higher quality images and data with the highest accuracy levels and at the same time lowering overall costs to our clients.

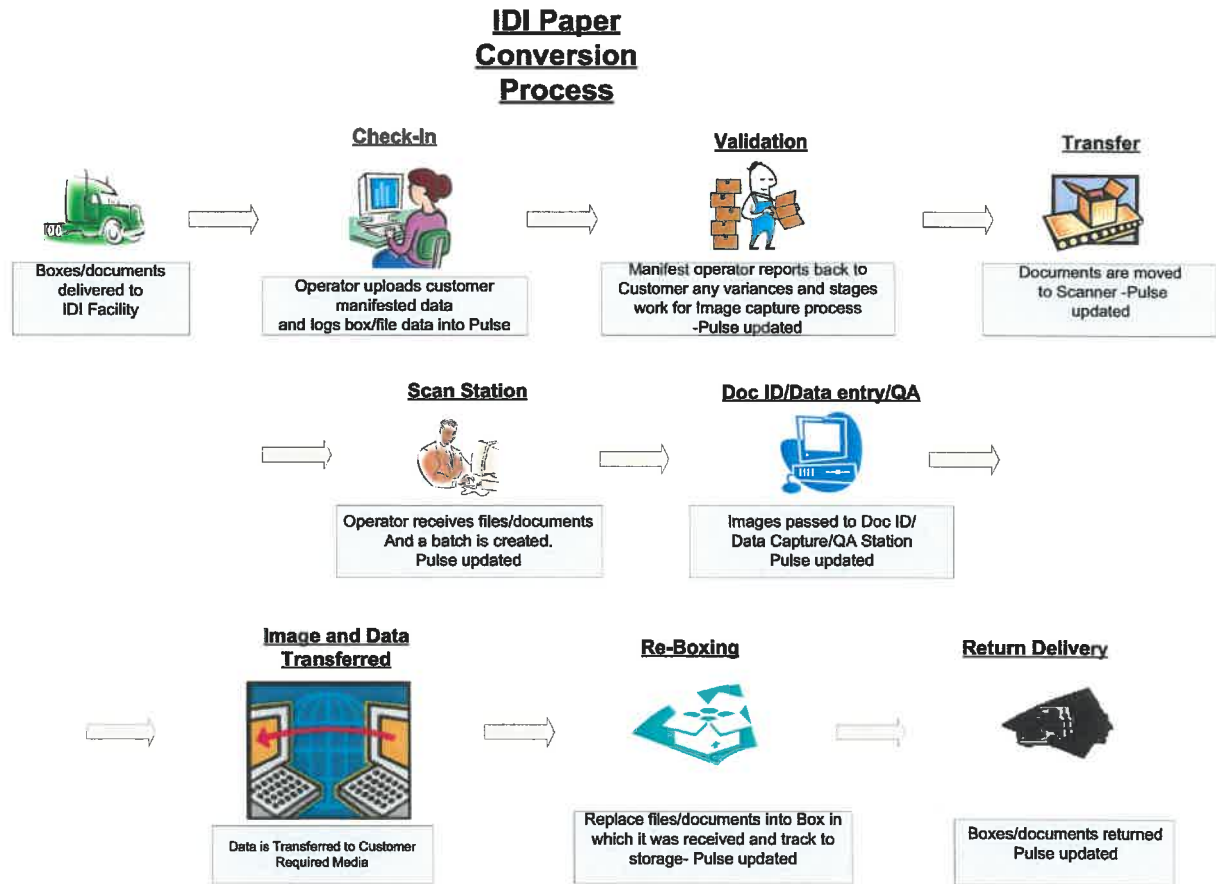
#### Sample Lean Cell Design



## Production Planning and Process Control Activities

The Production phase commences with the transfer of project knowledge from Ramp up to production personnel through systematic training. A team of cross-functional personnel carries out the production activities. This team is dedicated to meet the customers' requirement in terms of quality, timeliness and other deliverables. The cross-functional team contains expertise for document preparation, conversion instruction, ramp up, software, and production planning activities.

The initial activity in the production phase is the creation of the project management/implementation plan that describes the quality objectives, the project deliverables, project schedules, resource requirements, training schedules, risk assessment, risk mitigation plans and individual responsibilities towards meeting the project targets and deliverables.



**The following are examples of quality measures within the project:**

**Document Preparation - Paper Audit (If warranted)**

- IDI will insert a “File Level” barcode sheet as well as “Document Type” barcode labels on the various document types within the file.
- Paper files will be audited to validate the document preparation process is complete and accurate prior to being sent to the scanning area.

**Scanning – Attended Mode QC**

- Scan in “Attended Mode” to assure that the best quality image is rendered
- Visually inspects each image as it is captured and interrupt scanning if any issues that comprise image quality are detected such as double feeds, folded corners, light images, dark images etc.
- While attended mode scanning is slower than unattended scanning, it provides the first line of image quality control and avoids re-scanning documents.
- IDI utilizes auto-blank page deletion when dropping the back side/page of a paper document with no content. This process is over 99% effective/accurate provided the backs are clean of smudges and darkened areas. With this process, backs with content will not be deleted but backs that have content, dark areas, or smudges will remain and be part of the image transfer stream.

**Image Clean-up Processes**

- Image processing includes de-skew, de-speckle, black border removal and crop.
- IDI utilizes state of the art production scanners and image processing technologies to render the best possible electronic document images comparable to the quality of the original documents.
- Set-up entails scanner adjustments to assure the accurate and complete capture of the documents.

**Post Scan Automated QC**

- QC steps are looking for a corrupt image, large image file size, etc.
- In addition other steps are typically introduced which may include:
- Manually review blank backs and delete.

**Post Scan Visual QC**

- After the automated QC has completed, a QC operator will perform visual QC of images and data prior to sending the batch to “Release”. This is a random effort after all errors in the process have been corrected.

**Workflow QC**

- If discrepancies are found within a batch in any step of the conversion process, then the entire batch is directed to Quality Control Module and re-processed to correct identified issues.

**Post Release QC**

- An automated process is run against the batch to ensure all images and data have been written properly and none are corrupt.

TOWN OF NEEDHAM

**Pricing Summary**

Needham, MA Marriage Vitals-- Books		
Description	# Books/Units	Images
Marriage Records	93	16,275
One-time set-up		
Pick-up		
Return		

Note: Pricing is based on the document samples reviewed and outlined in this proposal. Other documents not described for these same and other departments may need review for valid pricing points.

IDI expects documents to be in orderly condition, not damaged by water or other contaminants, with easily identifiable index fields and light to medium prep of documents. If these conditions do not exist, boxes may be rejected, or price increase may apply.

Above is the complete list of services priced in this agreement. Other services required and not outlined in this enclosure should not be implied.

Pricing is based on the quantities listed in this proposal. If the images are more or less than 10% of the assumed quantities, the per-image price is subject to change based on the number of images actually submitted.



# Authorization & Agreement

The **Town of Needham** hereby agrees to the procedures outlined above and authorizes Image Data to proceed with the project.

Note: pricing is based on the quantities listed in this proposal. If the images are more or less than 10% of the assumed quantities, the per-image price is subject to change based on the number of images actually submitted. Pricing is also based on site review and specifications included in this proposal.

In witness whereof, this agreement has been executed by a respective signatory of each party whose signature appears below and is on the date of this Agreement duly authorized by all necessary and required corporate action to execute this agreement.

Customer: Town of Needham  
Address: 1471 Highland Ave.  
Needham, MA 02492

Vendor: Image Data, Inc.  
Address: 18 Petra Lane  
Albany, New York 12205

Name: \_\_\_\_\_

Name: Laurie Green

Printed: \_\_\_\_\_

Printed: Laurie Green

Title: \_\_\_\_\_

Title: Senior Account Executive

Date: \_\_\_\_\_

Date: August 19, 2019



Pricing Proposal  
 Quotation #: 17707647  
 Created On: 9/10/2019  
 Valid Until: 9/30/2019

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## Town of Needham

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### Theodora Eaton

1471 Highland Ave.  
 Needham, MA 02492  
 United States  
 Phone: 781-455-7500  
 Fax:  
 Email: Teaton@needhamma.gov

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## Inside Account Manager

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### Kelsey Alcorido

290 Davidson Ave.  
 Somerset, NJ 08873  
 Phone: 800-527-6389 EXT 5553598  
 Fax:  
 Email: Kelsey\_Alcorido@SHI.com

All Prices are in US Dollar (USD)

Product	Qty	Your Price	Total
1 Marriage Records Image Data, Inc. - Part#: Contract Name: Software Reseller Contract #: ITS58 <b>Note: 93 Books/Units</b>	16275	\$0.61	\$9,927.75
2 One-time set-up Image Data, Inc. - Part#: Contract Name: Software Reseller Contract #: ITS58	1	\$239.36	\$239.36
3 Pick-up Image Data, Inc. - Part#: Contract Name: Software Reseller Contract #: ITS58	1	\$452.13	\$452.13
4 Return Image Data, Inc. - Part#: Contract Name: Software Reseller Contract #: ITS58	1	\$452.13	\$452.13
5 Project Management SHI CONFIG - Part#: Contract Name: IT Project Services Contract #: ITS74	1	\$500.00	\$500.00
		<b>Total</b>	<b>\$11,571.37</b>

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## Additional Comments

Thank you for choosing SHI International Corp! The pricing offered on this quote proposal is valid through the expiration date listed above. To ensure the best level of service, please provide End User Name, Phone Number, Email Address and applicable Contract Number when submitting a Purchase Order. For any additional information including Hardware, Software and Services Contracts, please contact an SHI Inside Sales Representative at (888) 744-4084.

SHI International Corp. is 100% Minority Owned, Woman Owned Business.  
TAX ID# 22-3009648; DUNS# 61-1429481; CCR# 61-243957G; CAGE 1HTF0

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*The products offered under this proposal are resold in accordance with the terms and conditions of the Contract referenced under that applicable line item.*